U.S. DEPARTMENT OF ENERGY | Energy Efficiency & Renewable Energy

User Guide to the OpenText Content Management System

A guide to OpenText's website editing capabilities for EERE editors, developers, and QAers

Last Updated: 4/2011

OPEN TEXT Web Solutions

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●●● Get Started ●●●

This section will help orient you to OpenText's website editing tools and introduce you to how Web content management works.

Introduction to Web Content Management

A Web content management system (CMS) is a tool that helps streamline the creation, organization, and management of Web content by:

- Separating the editable content from the layout of that content (the website's look and feel). This allows people without knowledge of HTML to create new pages and edit content without involving a Web developer. In addition, it ensures that the look and feel of all EERE sites remain consistent, helping promote a positive user experience.

- Introducing workflow and approval processes to make it easier to keep content up-to-date, accurate, and standards compliant.

The OpenText CMS provides two tools to create and edit websites:

- **SmartEdit** – Easy-to-use editing tool that allows editors, developers, and QAers to add, update or delete content on sites. This tool allows you to add images, links, documents, and other resources to your sites, and facilitates the process of submitting pages for QA and publication to the live site (known as workflow). This user guide will introduce you to OpenText's editing capabilities so you can take advantage of them.

- **SmartTree** – A powerful, technical tool used by OpenText administrators, SmartTree is used to create the templates into which editors can add and manipulate their content. An administrator will need to get involved during the creation of a new site, during site redesigns, or when major new parts of sites are built. Because this is a technical tool used mainly for site administration, SmartTree is not covered by this user guide.

Log On

To access OpenText, you will use your standard browser (no special software is required). OpenText works best with Internet Explorer 6.0 or better; however, it also will work with Firefox and Mac Safari browsers (although functionality is limited).

To log on:

1. Disable any browser pop-up blockers, which may prevent dialog windows from functioning properly.

2. Open your browser window and type in the URL for the log in screen: http://eerewebcms.ee.doe.gov/cms/.

3. Enter your username and password (to be provided by an OpenText administrator; contact your Energy Enterprise Solutions [EES] representative if you have questions), and select "Start." Sometimes you will get a message that you're already logged on with another session. If you see this message, select "Yes" (remembering to log out of each session will prevent this message in the future).

Left Navigation Menu Options

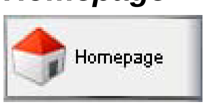
When you log on, you will either land on the Homepage or the SmartEdit page, depending on what you were doing when you last logged out. If you land on the Homepage, you will see a series of other left navigation buttons available to you – this is referred to as the ***general menu***. Using the general menu, you can access information about the projects you are given permission to edit.

If you land on the SmartEdit page, you'll see a different set of left navigation buttons – this is referred to as the ***editing menu***. The editing menu is what you will use to edit your site.

If you land on the Homepage, you can select "Web Content Manager" to toggle to the editing menu. If you are on the SmartEdit page, select "Homepage" to get back to the general menu.

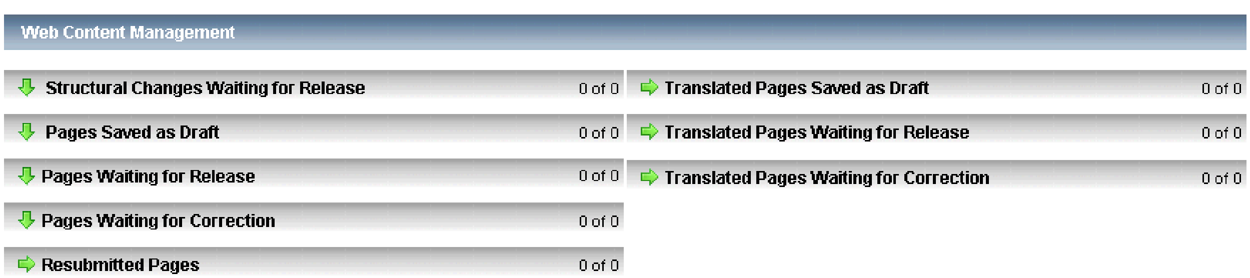
General Menu Options

Homepage



Provides summary information about the pages you are working on, or tasks that have been assigned to you. The Homepage contains most of the information and functions you will find in the Tasks section, although not all tasks may be visible at once (see the Homepage FAQ for more information).

Sample Homepage:



Web Content Manager

Use to toggle over to the editing menu.

Asset Manager

Used by some sites to store and manage images and attachments such as PDFs and MS Word documents. Appendix A offers more information about using the OpenText asset manager. Most EERE sites use the Asset Transfer System (ATS) instead to move assets to the staging and production servers, where they are stored.

Main Menu

Primarily used to select a project or change user settings like your email address, password, or the text editor you want to use.

Log Off

To avoid alert messages when you log on, it is best to get into the habit of logging off before closing your browser.

Editing Menu Options

From the editing menu, you still have access to the Homepage, the Main Menu, and the Log Off functions. In addition, you have some more options to help you with editing:

SmartEdit

Use the links to navigate to the page you want to edit.

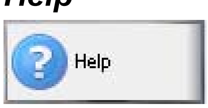
Search

Allows you to search for EERE pages that have been migrated into or created in OpenText. You can search by different criteria, including the page headline, page ID, keyword, or selected words from the page text. Learn more about searching for pages in OpenText.

Tasks

Enables you to submit, approve, or correct pages for publication. The publication process is referred to as “workflow;” visit the section on publishing pages to learn more about using the Tasks feature.

Help



Links to the CMS Online Help area for more information on editing your Web content using OpenText.

Links to this user guide for more information on editing your Web content using OpenText.

Select a Project

Unless you are a first-time OpenText user, the main EERE OpenText project has already been selected for you (you should see “EERE Web Ver 1” in the gray bar in the upper left corner of your screen, below your name).

However, if you have permission to edit multiple EERE websites, you can switch between the sites by selecting the “SmartEdit” button in the left navigation, and then navigating to the site you wish to edit.

First-Time OpenText Users

You will only need to go through this process if your Homepage is blank after you log on.

1. Select “Main Menu” from the left navigation.

2. Select “Projects” from the Main Menu dialog window. Note that you will see additional, project-specific options on the Main Menu dialog if you access the Main Menu from the editing menu.

3. Select “EERE Web Ver 1” from the Project Selection dialog window.

4. If you accessed the Main Menu from the general menu, select “Web Content Manager” from the left navigation to toggle to the editing menu, and navigate to the page you want to edit.

Change User Settings

You can change your OpenText password, the email address to which your workflow emails are sent, or your text editor using the process below:

1. Select “Main Menu” from the left navigation.

2. Select “User Settings” from the Main Menu dialog window.

3. At the Edit User Data dialog window, type in your new email address, add a new password, or change other settings such as language or preferred text editor.

●●● Edit Existing Pages ●●●

This section provides information on enhancing and maintaining your existing pages.

Find the Page You Want to Edit

There are three ways to find a page you want to edit: navigate to it, search for it, or select it if it's assigned to you as a task. Learn more about these three options below.

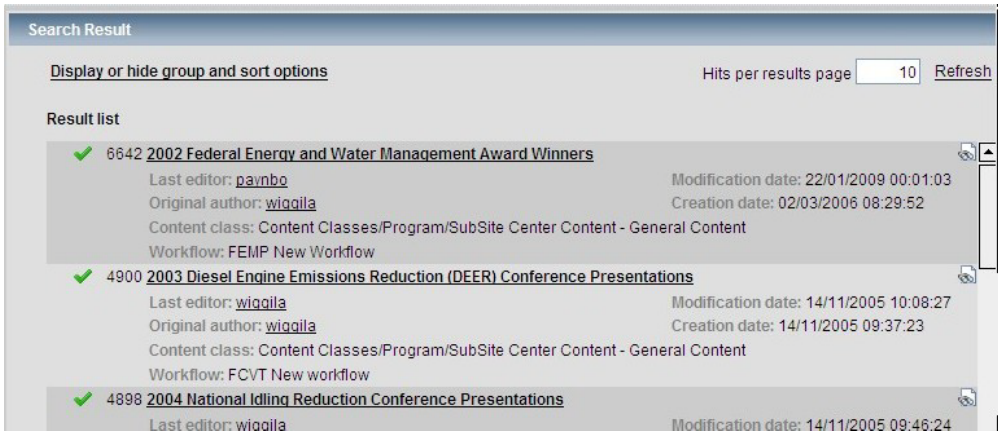
Navigate to the Page

To navigate to any page you have permission to edit in OpenText, select "SmartEdit" from the editing menu, then use the links in the center of the screen to navigate to the page you want to edit (the same way you would navigate through the live site).

Search for the Page

OpenText's search feature, which can be accessed by selecting "Search" from the editing menu, allows you to find EERE pages that have been migrated into or created in OpenText. You can search by different criteria, such as the page headline, selected words from the body text, or the page ID (available above the page menu when a page is open for editing):

Once you have results, you can preview a page by selecting the “preview” icon ( ) on the right side of the dialog window, or you can go to the page by selecting the page headline. indicates that a page is connected on the site, indicates that the page is in workflow, and indicates that the page is an orphan - it exists, but is currently not connected to a parent page on the site:



Limit Search by Keyword

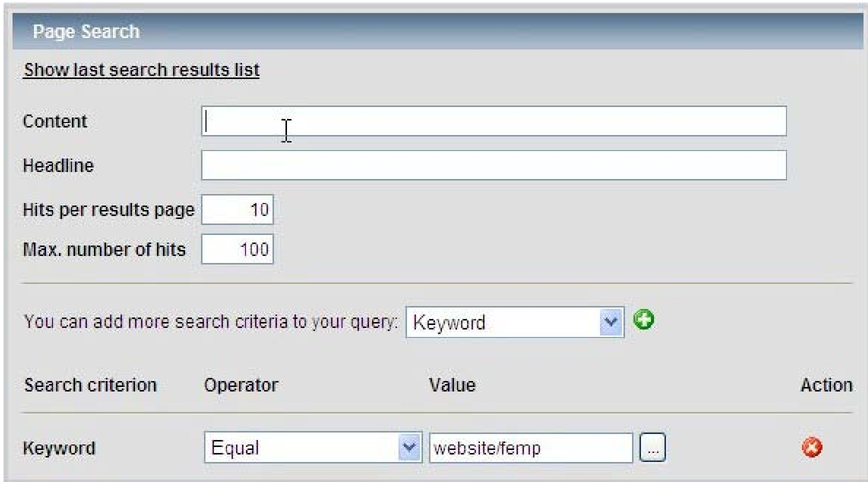
The search feature, by default, returns results from all EERE sites that have been migrated into OpenText. However, every page in OpenText is given a keyword that identifies it as part of a particular site or subsite. You can use these keywords to limit your search to a particular site:

1. Select “Search” from the editing menu.

2. Select “Keyword” from the pull-down menu at the bottom of the window. Select “Equal” or “Not equal,” then select to go to the next window. Choose “website” as the category, then find the keyword below. If you are unsure which category or keyword to use, consult the table of keywords.

3. Select “OK” to return to the previous window, then select “Start.” You can use the to add more keywords. You can also search by page ID, creation date, workflow, and other criteria.

For example, this search would return results from the Federal Energy Management Program (FEMP) site only (including all the program's subsites):



This search would return results from FEMP's Water Efficiency subsite only:

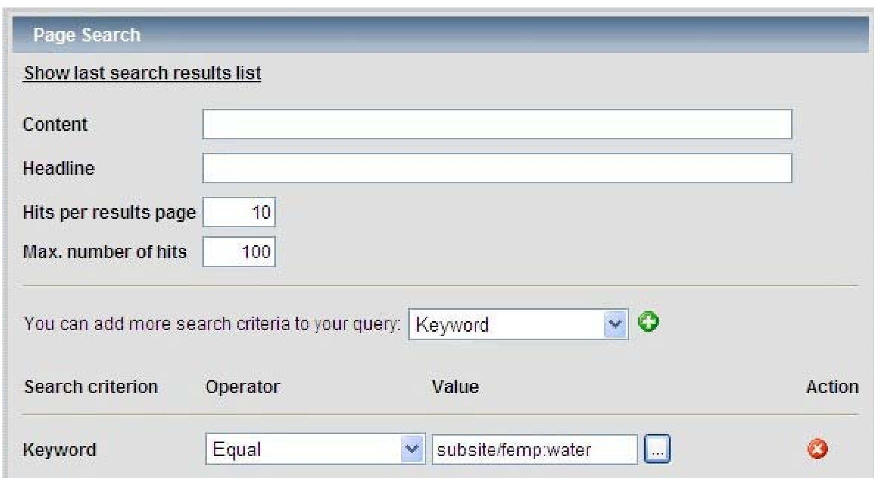


Table of Keywords

The table below lists keywords for all sites in OpenText as of publication of this document.

Note: You should use "website" as the category if you want to search an entire program or office site, including subsites. Use "subsite" if you only want to search a particular subsite.

Site Name	Subsite Name	Keyword Category	Keyword
PROGRAMS			
Biomass		website	biomass
	27th Symposium on Biotechnology for Fuels and Chemicals	subsite	biomass:biotech

Building Technologies		website	buildings
	Appliance and Commercial Equipment Standards	subsite	buildings:standards
	BetterBuildings	subsite	buildings:better
	Building America	subsite	buildings:america
	Builders Challenge	subsite	buildings:challenge
	Builders Challenge Participants	subsite	buildings:participants
	Commercial Building Energy Alliances	subsite	buildings:alliances
	Commercial Buildings: Energy Efficient Building Practices	subsite	buildings:commercial
	Energy Open House	subsite	buildings:openhouse
	EnergySmart Schools	subsite	buildings:schools
	Commercial Building Initiative	subsite	buildings:netzero
	High Performance Windows and Low-e Storm Windows Volume Purchase Program	subsite	buildings:windowsvolume
	Home Energy Score	subsite	buildings:energyscore
	Rebuilding Green in Greensburg, Kansas	subsite	buildings:greensburg
	Solid-State Lighting	subsite	buildings:ssl
	Utility Solar Water Heating Initiative	subsite	buildings:ush2o
Clean Cities		website	cleancities
	Coordinator Toolbox	subsite	cleancities:toolbox
FEMP		website	femp
	Transformational Energy Action Management Initiative	subsite	femp:team
Fuel Cell Technologies		website	hydrogen
	Education	subsite	hydrogen:education
	Fuel Cells	subsite	hydrogen:fuelcells
	Hydrogen Delivery	subsite	hydrogen:delivery
	Hydrogen Production	subsite	hydrogen:production
	Hydrogen Storage	subsite	hydrogen:storage
	Safety, Codes, & Standards	subsite	hydrogen:codes
	Systems Analysis	subsite	hydrogen:analysis
	Technology Validation	subsite	hydrogen:validation
Geothermal Technnologies		website	geothermal
Industrial		website	itp

Technologies			
	Aluminum	subsite	itp:aluminum
	BestPractices	subsite	itp:bp
	Chemicals	subsite	itp:chemicals
	Combustion	subsite	itp:combustion
	Energy Intensive Processes	subsite	itp:processes
	Energy Management Demonstrations	subsite	itp:emdemos
	Energy Matters	subsite	itp:energymatters
	Forest Products Industry of the Future	subsite	itp:forest
	Fuel & Feedstock Flexibility	subsite	itp:fuelflex
	Glass Industry of the Future	subsite	itp:glass
	Hurricane Ready	subsite	itp:hurricane
	Industrial Materials for the Future	subsite	itp:imf
	Industrial Distributed Energy	subsite	itp:distributed
	ITP E-Bulletin	subsite	itp:ebulletin
	Metal Casting Industry of the Future	subsite	itp:metalcasting
	Mining Industry of the Future	subsite	itp:mining
	Nanomanufacturing	subsite	itp:nano
	Petroleum Refining Industry of the Future	subsite	itp:refining
	Save Energy Now	subsite	itp:saveenergy
	Save Energy Now State Partnerships	subsite	itp:statepartner
	Saving Energy in Data Centers	subsite	itp:data
	Sensors & Automation	subsite	itp:sensors
	Steel Industry of the Future	subsite	itp:steel
	Utility Partnerships	subsite	itp:utilitypartner
Solar Technologies		website	solar
	High Penetration Solar Portal	subsite	solar:penetration
	Procuring Solar for Federal Facilities	subsite	solar:procuring
	Program Review Meeting	subsite	solar:prm
	SunShot Initiative	subsite	solar:sunshot
Vehicle Technologies		website	vtp
	Advanced Vehicle Testing Activity	subsite	vtp:avta
	EPAct Transportation Regulatory Activities	subsite	vtp:epact
Wind &		website	

Hydropower			windhydro
	Federal Wind Siting	subsite	windhydro:windsiting
Weatherization & Intergovernmental Program		website	wip
	Guide to Tribal Energy Development	subsite	wip:tribalguide
	Solution Center	subsite	wip:solution
OFFICES			
About the Office of EERE		website	abouteere
Business Administration		website	ba
Commercialization		website	commercialization
Deployment		website	deploy
	Community Renewable Energy Deployment	subsite	deploy:communityre
Efficiency & Renewables Advisory Committee		website	erac
Field Operations		website	fieldops
EERE Analysis		website	analysis
International Activities		website	international
Planning, Budget, & Analysis		website	pba
	EERE Program Evaluation	subsite	pba:programeval
	Energy Intensity Indicators in the U.S.	subsite	pba:indicators
EERE CORPORATE			
American Recovery & Reinvestment Act		website	recovery
EERE Communication Standards & Guidelines		website	commstandards
EERE Information Center		website	infocenter
Energy Calculators & Software		website	calculators
Energy Education & Workforce		website	education

Development			
	Energy Efficiency & Renewable Energy Postdoctoral Fellowships	subsite	education:postdoctoral
Energy Savers Tips		website	tips
Energy Savers Consejos		website	consejos
Financial Opportunities		website	financial
Maps & Data		website	maps
Multimedia		website	media
Plans, Implementation, & Results		website	pir
Roofus' Solar & Efficient Home		website	roofus
Site Administration		website	admin
Sustainability Performance Office		website	spo
Web Site Policies		website	webpolicies

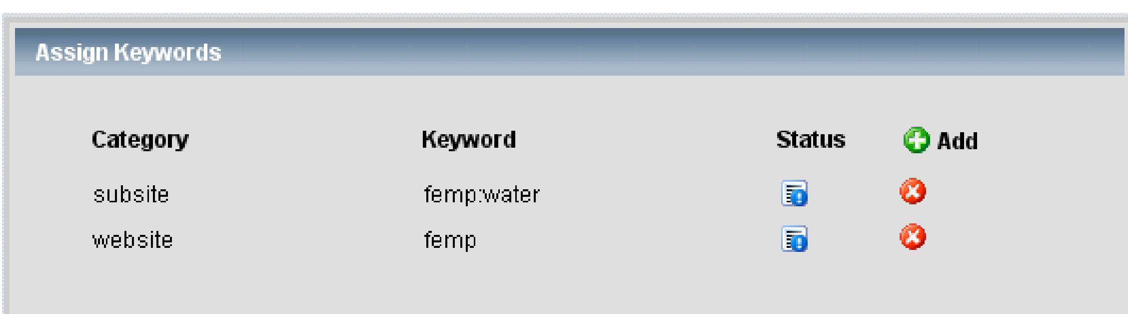
In you are still not sure which keyword to use for a particular site after looking at the table, follow these steps:

1. Navigate to a page on the site you want to search.

2. Select the open page red dot ; this will open the [page menu].

3. Select "Keywords" from the page menu.

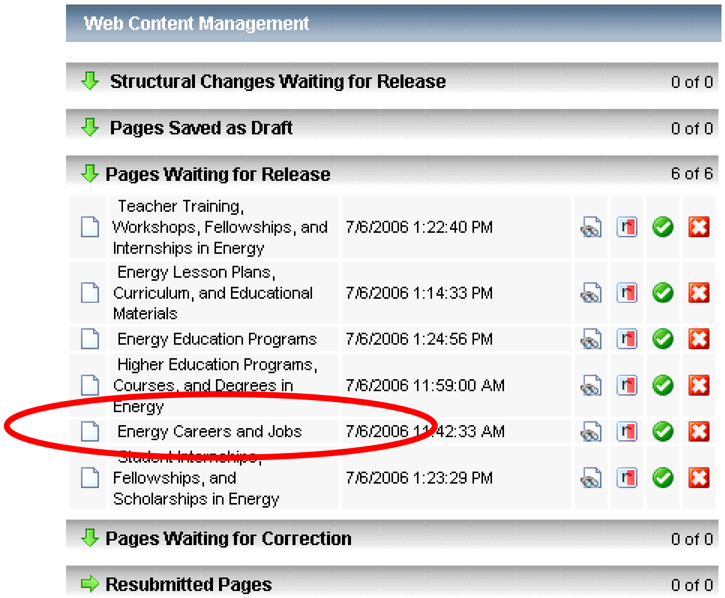
4. On the Assign Keywords dialog, you will see a list of keywords that have been assigned to your site:



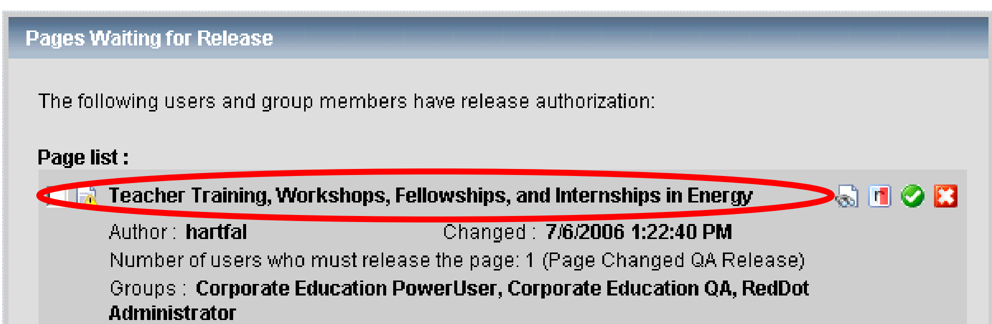
Select Page from Your Task List

If a task has been assigned to you through workflow, or if you're returning to edit a page you've saved as a draft, you can access the page using any of the methods below:

- Select the page headline from the Homepage (see the Homepage FAQ if you don't see every task you would expect on the Homepage):



- Use the Tasks feature on the editing menu. Select the Tasks button, select the task itself (i.e., the link under "Pages Waiting for Release"), then select the headline of the page you want to edit:



Using the Red Dots

Red dots show you what content you can edit, and the symbol inside the red dot tells you what that dot allows you to do.

Once you have found the page you want to edit, you will see the open page red dot. If you select this dot, you will open the page for editing, and you will see other red dots as well as extra instructional text (the dots and special text won't appear on the published Web page). When you select a red dot, a window will open so you can perform your task.

Most often you will see these red dots:

	Open page dot Opens a page so it can be edited
	Edit dot Opens a window so you can edit the corresponding content element
	Save dot Appears if you enter DirectEdit mode; select this dot to save your changes and exit DirectEdit
	Single link dot Opens the editing mode of an element that can link to a single page or URL
	Multilink dot Allows you to create and connect new pages
	Locked page dot Identifies content currently being edited by another user, or that you don't have permission to edit
	Close page dot Closes the editing mode of a page and saves all changes

In special cases, you may also encounter the following red dots:

	Add page dot Enables you to add a new page at this location
	Translate dot Opens elements in the translation editor that require translation
	Mandatory dot Opens elements that must contain content
	Release page dot Identifies a page submitted for release
	Form dot Allows you to edit all the content elements of a page using a single form

Once you have finished editing your page, select the close page red dot to save your changes. If you navigate to another page without closing the first page, OpenText will automatically close the first page and save your changes.

DirectEdit for Simple Changes

For text changes that require no formatting, you can use DirectEdit mode. DirectEdit allows you to change the page headline and text directly on the OpenText page, without opening the text editor (see Using the Text Editor for more complex edits).

Follow the steps below to edit your page using DirectEdit:

1. Select the open page red dot .

2. Hold down the Ctrl key on your keyboard and select the edit red dot for the element you want to change. A red box appears around the text you can edit, and you will see a cursor.

3. Edit the text.

4. To save your changes and exit DirectEdit, select the save red dot , which appears in place of the edit dot for the element you are editing.

Example of content in DirectEdit mode:

[edit content]

Whatever your energy goals may be, you need dollars to make projects happen. This section can help you decide whether to fund energy improvements through energy savings performance contracts, utility energy service contracts, efficiency and renewable energy incentive programs, or some combination. Learn all about these tools as well as how FEMP can help you access these valuable resources.

Using the Text Editor

For complex blocks of text that need formatting, the text editor will open when you select the edit red dot (for simple text changes, consider using DirectEdit instead).

You can use the text editor like you would use MS Word or Word Perfect ─ any formatting changes you make are automatically translated into HTML. Use the information below to learn more about formatting your content in the text editor.

With version 9.0, you have a choice of several different text editors (learn how to change your text editor). Please note that the EERE default editor is the Telerik RadEditor; other editors will work a little differently in performing the tasks described below.

Insert Prewritten Text

If you would like to insert text written in other programs into the OpenText text editor, follow these steps:

1. In your original document, highlight the text you'd like to add to the text editor.

2. Select "Copy" (or hit "Ctrl+C") in your original document.

3. Place the cursor on the text editor where you would like to paste your text.

4. Select Paste as Text from the toolbar to paste your text. **Please do not use "Ctrl+V" to paste in your text**, because this will insert unnecessary HTML formatting code that will cause your page to load more slowly when people try to view it. Telerik also offers a Paste from MS Word button for text in Microsoft Word.

5. Use the toolbar to format your text.

6. Select "Save" to save your work, or "OK" to save your work and exit out of the text editor ("Ctrl+S" and the Enter key do not work for this function).

Format Text

The Telerik RadEditor offers several options for formatting your text the way you'd like it to appear on the page. As you would with any text editor, simply highlight the text, then select the appropriate formatting button from the toolbar. Once finished, select "Save" or "OK" to save your work ("Ctrl+S" and the Enter key do not work, although other keyboard shortcuts do).

Below are some of the tools available to you (also note that if you mouse-over the button in the text editor, a brief description of the button's function will pop up to aid you):

Header Style

Page headers, which are identified by special HTML header tags (<H2> for example), are used by search engines to rank pages, and they are used by visitors and screen readers to skim your page content.

Like print documents, Web page headers should be used in the proper hierarchical order (i.e., H2 should be used before H3). These are the header styles available to you:

H2	Medium red text header
H3	**Small bold, black text header**
H4	**Small grey text header**

Note: Please don't use H5 or H6 for EERE sites; there is no style defined for these headers. In addition, the first level header, H1, is only used for your page title.

Text Style

	Bold
	Italic
	Superscript
	Subscript
	Remove formatting

Underlining text is not an option with the current text editor settings because it is easy for users to confuse underlined text with links. If you have a legitimate need to underline some text, contact your developer, who can insert the appropriate HTML tags into the source code.

Text Alignment and Decoration

	Align left Aligns text with the left side of the page (this is the standard text alignment on EERE sites)
	Center Centers text on page; use sparingly
	Align right Aligns text with the right side of the page; use sparingly
	Decrease indent Removes previous indents
	Increase indent Indents text to the right
	Numbered list Turns selected text into a numbered list
	Bullet list Adds bullets at the beginning of selected lines; to start a new set of bullets that is indented under the first set, place the cursor at the end of the last bullet and select “Insert List” again
	Horizontal line Adds a gray horizontal line

Text Reorganization

	Cut Removes highlighted text and places it in the clipboard
	Copy Copies highlighted text and places it in the clipboard
	Paste as Text Pastes text from the clipboard onto the page; learn more about pasting text from other programs

	Undo Undoes last editing steps performed (to last time page was saved)
	Redo Repeats last editing steps performed
	Insert Symbol Inserts special characters such as © and ¼ into your text.

Links

There are different ways to add links to your page using the text editor. The method you use depends on the type of link you want to add and type of page you are linking to.

Links to Pages on Other Websites

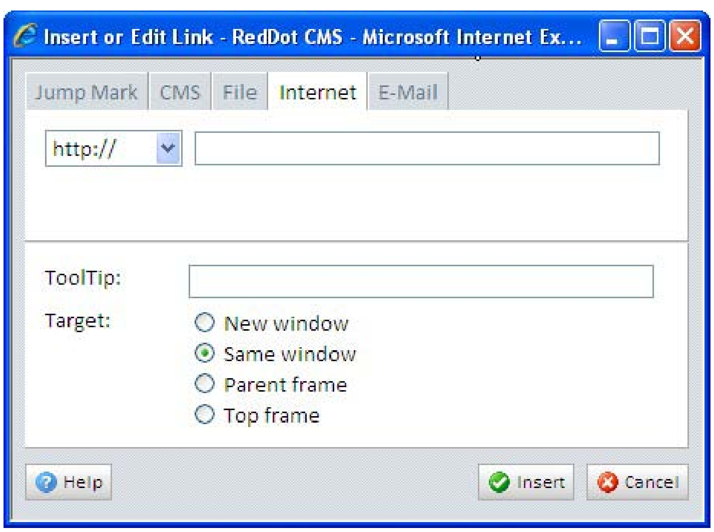
Use this linking method if you want to connect to a non-EERE site, or to an EERE site other than the one you are currently editing (from the Solar site to the Builders Challenge subsite of Buildings, for instance):

1. Using your mouse, highlight the text that you want to use for the link.

2. Select Link from the toolbar.

3. Copy the URL from the page you want to link to.

4. Use "Ctrl+V" to paste the URL at the Internet tab of the Insert or Edit Link dialog:

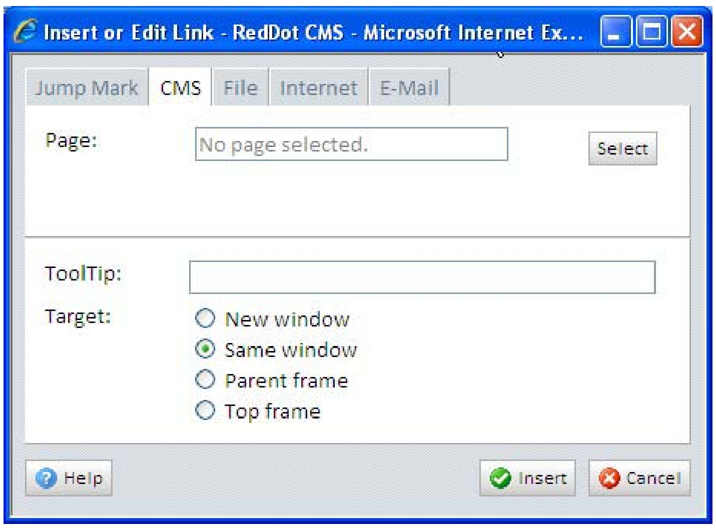


It is best to paste the URL in instead of typing it to prevent errors in the address, which will create a broken link.

Links to Pages Within Your Website

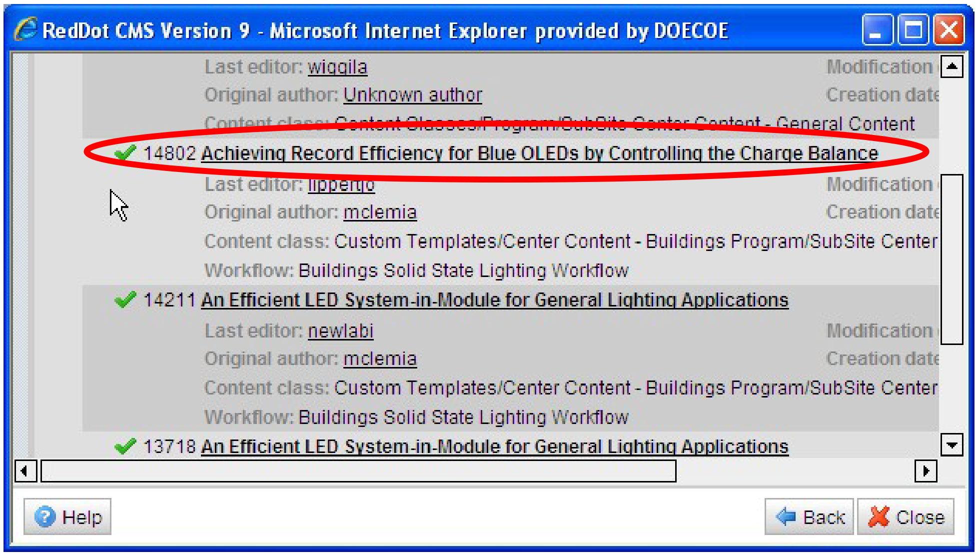
OpenText uses unique IDs to identify all pages within the CMS. By using OpenText links to link between pages on your site, the CMS can track these internal links. Use this linking method if you want to connect to another page on your program, subsite, or office site (such as from one Industry corporate page to another Industry corporate page):

1. Using your mouse, highlight the text to which you want to add a link.
2. Select Link from the toolbar.
3. From the Insert or Edit Link dialog window, select the Select button at the CMS tab:

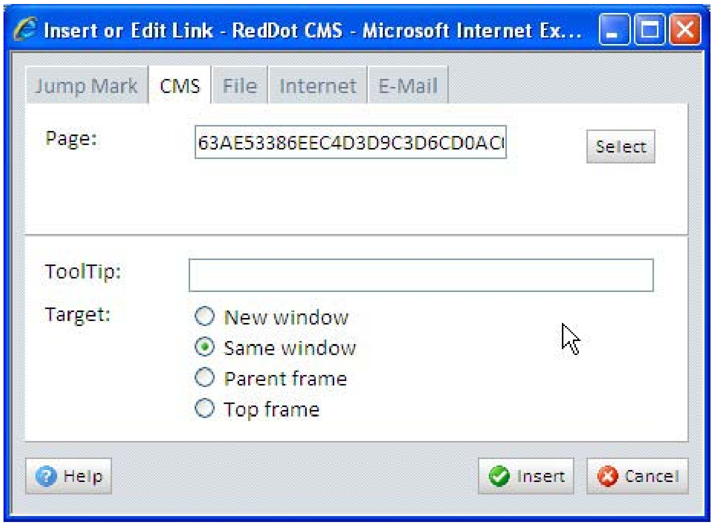


4. Search for the page you want to link to using the headline, page ID, or words from the text, for example. You can use the pull-down menu for additional search options.

5. In the search results window, select the headline of your desired page:



6. The OpenText URL for your page now shows up in the box of the Insert or Edit Link dialog:



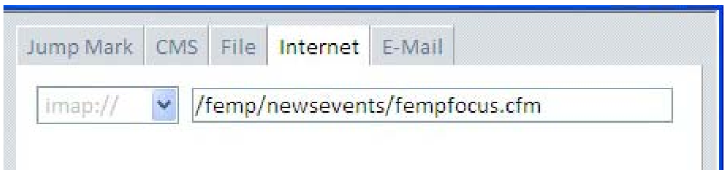
7. Select “Insert” to exit the dialog screen and add the link to your page.

There are two reasons to use this method when linking to pages within your site:

- OpenText will automatically remove the link from your page if the page you’re linking to is deleted (so you won’t have a broken link). You can choose if the page’s last editor, original author, or someone else will receive an email alerting him or her that a link has been removed from the page. That person will then need to manually remove the formerly linked text from the page.

- If you navigate through your site in OpenText and try to select a link that's been hard-coded instead of one that uses the OpenText URL, the link will take you out of OpenText and to the live site instead of to that page in OpenText.

***Note about linking to Cold Fusion pages on your site*:** If you are linking to a CFM page that is part of your site, use a site-relative link instead of an OpenText link (learn more about site-relative links). For example:



Links to Assets

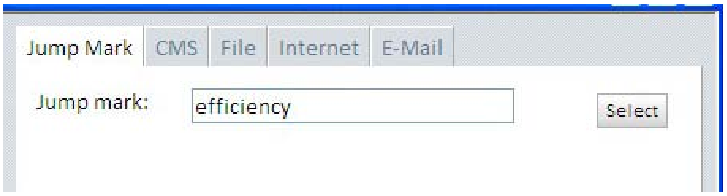
Links to assets such as PDFs, Word documents, and images should be ***site relative*** – in other words, the link should include only the part of the URL that comes after http://www.eere.energy.gov. For example, an asset link on the FEMP site would be inserted as /femp/pdfs/training.pdf (a FEMP subsite would look like /femp/derchp/pdfs/training.pdf). Learn more about adding images or adding attachments to your site.

Anchor Links (Jump Marks)

Use anchor links when you want to "jump" readers from one place on the page to another place on the same page (see the anchors at the top of this page down to the main page sections, for example).

1. Using your mouse, highlight the text you want to jump *to*.
2. Select Jump Mark  from the toolbar, then click "OK" at the dialog.
3. Highlight the text you want to jump *from*.
4. Select Link  from the toolbar.
5. From the Insert or Edit Link dialog window, go to the Jump Mark tab and click the Select button.
6. Select the text you defined in steps 1 and 2 from the available jump marks.

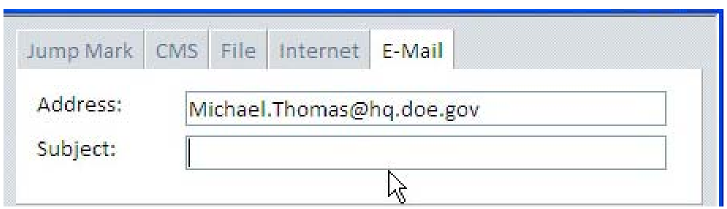
7. The OpenText URL for your link now shows up in the box of the Insert or Edit Link dialog:



Email Links

Follow the steps below to add a link to an email address:

1. Using your mouse, highlight the text to which you want to add the email address link.
2. Select Link  from the toolbar.
3. Copy the email address.
4. In the Insert or Edit Link dialog, go to the E-Mail tab and paste in the email address (you can also add information for the email's subject line):



Delete Links

1. Highlight the text of the link you want to delete.
2. Select Remove Link  from the toolbar.

Attachments

Attachments such as PDFs and MS Word documents are stored directly on the staging and production servers. New or replacement files can be transferred up to the servers by developers or QAers, using the Asset Transfer System (ATS). Once files have been uploaded, editors can use the text editor to link to them.

Note: A few sites store attachments in OpenText's asset manager instead of directly on the server; if your site is one of them, learn more about adding attachments stored in the asset manager to your page.

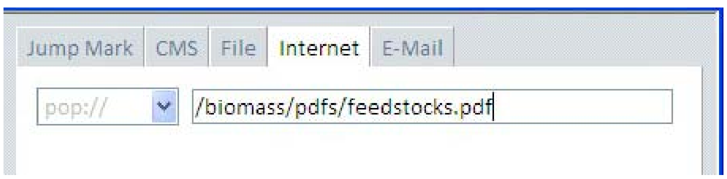
Add Links to Attachments

1. Ask your developer or QAer to upload the attachment to the staging server using the ATS. Your developer or QAer should email you the site-relative URL to use in linking to your attachment.

2. Open the text editor of the OpenText page from which you want to establish a link to the attachment and highlight the text you want to link. Your link format needs to comply with the EERE attachment linking standards.

3. Select Link  from the toolbar.

4. Add the site-relative URL into the box of the Insert or Edit Link dialog:



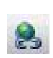
5. Select "OK" to exit out of the dialog; select "OK" again to exit the text editor and to save your work. ***Note:*** If you return to the Insert or Edit Link dialog, OpenText may add the rest of the URL text to the site-relative address, though it was not added to the page's actual source code and the link still will work correctly.

6. Submit the OpenText page to workflow; it will automatically publish to the staging server (http://www2.eere.energy.gov/xxx/). Check the page and attachment on the staging server to be sure everything is working properly.

7. Ask your QAer to QA and move the attachment up to the production server before releasing the associated OpenText page.

Delete Link to Attachments

1. Highlight the text of the link you want to delete.

2. Select Remove Link  from the toolbar.

If you no longer need the attachment you unlinked, ask your EES representative to remove the attachment from the servers.

Tables

Tables are best created by developers and added to your site's source code. Contact your developer if you'd like them to add or modify a table for you. When formatting tables, developers should pay particular attention to issues of Section 508 compliance.

Note that although it's possible to paste in a table formatted in another program (such as Excel or Word), it is better to create and format tables using the source code. Pasting in a table from another application will insert unnecessary HTML formatting code that will cause your page to load more slowly when people try to view it.

Delete Table

1. Click and drag over the table to select all of its cells.

2. Select "Delete" or "Backspace" on your keyboard.

Images

There are multiple ways to add images to your page. If you want to add images in unique locations on each page, you'll need to add them using the text editor, using the process outlined below. (***Note:*** If you have images that appear in the same place on every page, an OpenText administrator can develop a special page template for you to streamline the process for adding images to your pages; contact your EES representative for more information.)

Like attachments, images are stored directly on the staging and production servers. New or replacement images can be transferred up to the servers by developers or QAers, using the Asset Transfer System (ATS). Once files have been uploaded, editors can add them to their pages by linking to them.

Note: A few sites store images in OpenText's asset manager instead of directly on the server; if your site is one of them, learn more about adding images stored in the asset manager to your page.

Add and Position Image

Step 1 – Add Image

1. Ask your developer or QAer to upload the image to the staging server using the ATS. Your developer or QAer should email you the site-relative URL to use in linking to your image.

2. Open the text editor of the OpenText page to which you want to add the image. Select HTML  at the bottom-left corner. You are now looking at the HTML code for your page.

3. Scroll to the bottom of the page. At the end of code, add an image HTML tag, using the site-relative URL: <img src="site-relative URL">. For example:

```
facility managers.</p>
<UL>
<li>Federal managers grapple with tough energy management questions from how to
build a sustainable new facility to how to choose an energy-efficient and cost-
effective boiler.</li>
<li>Federal managers can find opportunities to improve energy efficiency and the use
of renewable energy technologies.</li>
</ul>
<P>Energy management is quite a worthy task.</p>

<img src="/biomass/images/hp_chart.gif">
```

4. Select Design to exit HTML mode; you should now see your image at the bottom of the page.

Step 2 - Position Image

For general placement, select the image and use your mouse to drag the image into the appropriate location. To fine-tune the image position:

1. Select the image.

2. Select Image from the toolbar.

3. Using the Insert or Edit Image dialog, you can:
   - Tweak the photo alignment (align right or left to wrap text around the image).
   - Add space/margin or a border around the image.
   - Add alt text (required by the EERE Web standards). Alt text is the text that appears when you mouse over an image; it is used by screen readers to describe images to visually impaired users, and is required by Section 508. Every image must have alt text (this should simply be a blank space between the attribute quotes in the HTML code for images that do not represent information – like lines, arrows, etc.). Learn more about writing standards-compliant alt text.

   Consult your developer if you need to fine-tune the placement of your image, or to add a caption.

4. Select "OK" (twice) to exit out of the dialog, then the text editor, and to save your work.

5. Submit the OpenText page to workflow; it will automatically publish to the staging server (http://www2.eere.energy.gov/xxx/). Check the page and image on the staging server to be sure everything is correct.

6. Ask your QAer to QA and move the image up to the production server before releasing the OpenText page.

Delete Image

1. Select the image.

2. Select "Delete" on your keyboard.

If you no longer need the image you deleted, ask your EES representative to remove the image from the servers.

Special Characters

Special characters, such as &, @, and $ sometimes require special HTML codes. If you are not using the Telerik RadEditor (see the steps below), you may need to ask your QAer to insert the appropriate HTML codes on your page before releasing the page to the live server. A list of special character codes is available from the Web Standards Project site.

To insert a special character:

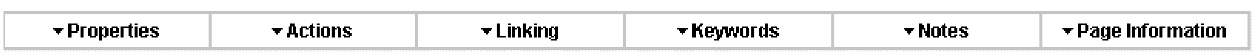
1. Place your cursor at the point in your text where you want the special character to appear.

2. Select Insert Symbol  from the toolbar.

3. Select the desired special character from the table, and it will appear in your text.

Using the Page Menu

The page menu is the gray task bar that appears at the top of a page when it is open for editing:



Below you'll find an overview of the various tasks you can perform on the open page using the page menu. Some of the functions may be "grayed out," indicating you do not have permission to access that function on this page.

Properties

- **Edit headline** - Allows you to edit the name, or title, of the page.

- **Edit file name –** Allows you to add or change the file name (all new pages are required to have a file name). ***Note:*** The file name becomes part of the URL for the page, so changing an established file name could break other people's links to your page.

Actions

- **Act on workflow** - Depending on your permission, you can use the Actions menu to submit the page to workflow, release the page, reject the page, and publish the page to the production server. See the section on publishing pages for more information on the workflow process for submitting and publishing pages to the production server.

- **Edit elements via form –** Allows you to edit all the content on the page using a single form, instead of editing each element individually using the red dots.

- **See different versions of the page –** Allows you to compare different versions of the page.

- **See page preview –** Provides a preview of what the page will look like when it is published. "Permanent Page Preview" allows you to keep the preview window open when you switch pages.

- **Plug-ins –** Allows you to add or remove pages from the left navigation (see the Create, Connect, Archive, Delete Pages section to learn more about altering the left navigation). Also allows you to delete the page.

Linking

- **View parent page(s) leading to the page –** Shows the parent page, or pages, from which the page you are on is linked (in general, each page will only have one parent). Only pages linked via the multilink red dot at the bottom of the open parent page will appear here; additional links to your page that have been made through the text editor will not appear.

- **Edit appearance schedule –** Allows you to schedule the time period during which certain pages should be visible on your live site (can be useful for time-critical content like conference announcements, but has some drawbacks). Learn more about scheduling pages for publication.

Keywords

Keywords have a variety of different uses in OpenText. For EERE sites, keywords are used to limit searches to a particular site (the search feature, by default, returns results from all EERE sites that have been migrated into OpenText). Learn more about limiting searches using keywords, or learn about adding keywords to newly created pages.

Notes

Notes are used to communicate information about the page to other users in the workflow process. If a QAer rejects your page, they will be asked to write a note, which you can access here, and which will also appear on your Tasks list when you go in to correct rejected pages.

Page Information

Dialog window that contains information about the page, including:

- **General information –** Page headline, ID, template (content class), etc.

- **Status and workflow –** Whether page has been submitted to workflow and where it is in the process; when it was last released for publication.
- **Page lock –** Who is currently editing the page (this is blank if the page is in the workflow of another user).
- **Created and changed –** Who created the page and when; who last edited the page and when.
- **Project variants, language variants,** and other information.

Update News and Events

If your site uses the News and Events database to automatically populate your right column with content, you should continue to enter news and events into the database as you always have; they will display in the proper place on your OpenText site.

If you have questions about how to use the News and Events database, email Chris Stewart, National Renewable Energy Laboratory, at Chris.Stewart@nrel.gov.

Add/Update Features

Below you'll find some information on adding, changing, or deleting features for sites that use images for the feature (instead of HTML tables).

Note: The method for adding or changing features in your right column may vary slightly from site to site. Although you should receive information on editing your site's features (and other right column content) when you attend your OpenText training, your EES representative can also answer questions you might have.

Add a New Feature to One Page – 2009 Template

1. On the page on which you'd like to add the feature, open the third (right) column for editing (either select the open page red dot in the center column, or select [Open 3rd Column] in the right column).
2. Select the "add/change news/events/features" multilink red dot in the right column.
3. From the Edit Link Element dialog window, select "Create and Connect Page."
4. From the List of Content Classes dialog window, select the "Feature" content class (or "Feature – Image Only" for table-based features or image maps).
5. On the Edit Headline dialog window, enter a headline for your new feature (although this headline will not show up on the live site, it will show up in OpenText search results, so it should be descriptive).

6. The framework for your new feature is now in place in the right column:

   [close feature]
   [edit link]
   [edit querystring variables]
   [edit image]

   Next, you need to add the appropriate image and link.

   To add the image:

   - Be sure your developer or QAer has already uploaded the new feature graphic to the staging server. Your developer or QAer should email you the site-relative URL to use in linking to your image.
   - Select the "edit image" red dot for the new feature; this will open the text editor. Select HTML.
   - In place of the <P></P> you may see there, add an HTML image tag using the site-relative URL (be sure your image tag includes alt text): <img alt="alt text" src="site-relative URL">. For example:

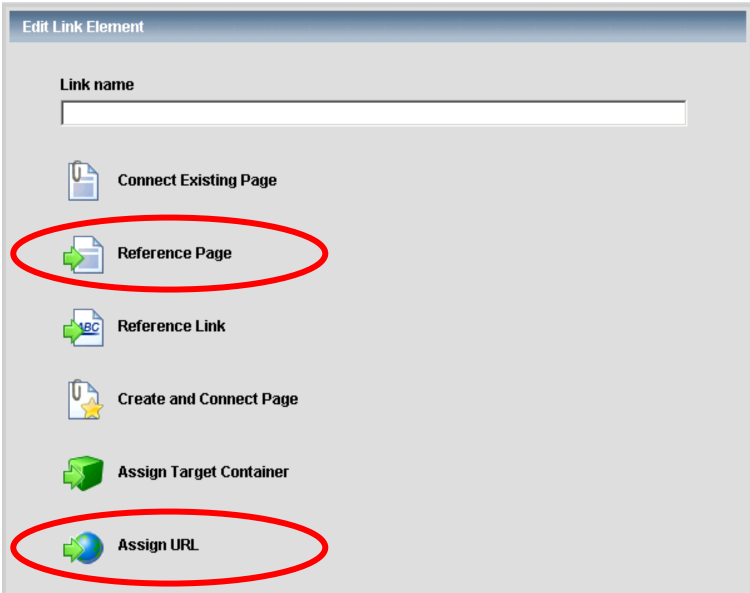
   ```
   <IMG alt="Learn more about the Energy Policy Act of 2005"
   src="/femp/images/feature_epact.gif">
   ```

   - Click "Design" to exit HTML mode; you should now see the new feature graphic.

   To add the link:

   - Select the "edit link" single link red dot for the new feature.

- From the Edit Link Element dialog window, select "Assign URL" to link to a page outside of your site (then paste in the URL on the Assign URL dialog window). To link to a page within your site instead, select "Reference Page" (then search for the headline of the appropriate page in the resulting search dialog window):



7. You have now added a simple feature to your right column. Information on altering the vertical position of the feature is available below.

8. Submit the new OpenText feature to workflow; it will automatically publish to the staging server (http://www2.eere.energy.gov/xxx/). Check the feature on the staging server to be sure everything is correct. If this is a brand new page that hasn't yet been sent to workflow, you'll need to send it to workflow to see the feature.

9. Ask your QAer to QA and move the image up to the production server before releasing the related pages in workflow.

Add a New Feature to One Page – 2010 Template

1. On the page on which you'd like to add the feature, open the third (right) column for editing (either select the open page red dot in the center column, or select [Open 3rd Column] in the right column).

2. Select the "add/change news/events/features" multilink red dot in the right column.

3. From the Edit Link Element dialog window, select "Create and Connect Page."

4. From the List of Content Classes dialog window, select the "Feature - New EERE Template" content class.

5. On the Edit Headline dialog window, enter a headline for your new feature (although this headline will not show up on the live site, it will show up in OpenText search results, so it should be descriptive).

6. The framework for your new feature is now in place in the right column:

   [close feature]
   [edit link]
   [edit code]

   You will see an image and text as placeholders, which you can disregard. When you add your own code for the appropriate image and link, it will replace them.

   To add the image and link:
   - Be sure your developer or QAer has already uploaded the new feature graphic to the staging server. Your developer or QAer should provide the site-relative URL to use in linking to your image.
   - Select the “edit code” red dot for the new feature; this will open the HTML editor.
   - In place of the <P></P> you may see there, add an HTML image tag using the site-relative URL (be sure your image tag includes alt text): <img alt=“alt text” src=“site-relative URL”>. Also add text with <p></p> tags, and the link with <a href> tags. For example:

     ```
     <a href="http://www.eere.energy.gov/kids">
     <img alt="Image of Tinkerbell." src="/education/images/tink.jpg"><p>
     Games, tips and fact sheets for kids</p>
     </a>
     ```

   - Click “OK” to exit HTML mode; you should see the new feature.

   You have now added a simple feature to your right column. Information on altering the vertical position of the feature is available below.

7. Submit the new OpenText feature to workflow; it will automatically publish to the staging server (http://www2.eere.energy.gov/xxx/). Check the feature on the staging server to be sure everything is correct. If this is a brand new page that hasn’t yet been sent to workflow, you’ll need to send it to workflow to see the feature.

8. Ask your QAer to QA and move the image up to the production server before releasing the related pages in workflow.

Add the Same Feature to Multiple Pages

Some sites use the same feature on multiple pages. For these sites, the features are generally linked to each other at the time your site is built (so if you replace the existing feature on one page, it is automatically changed on the other pages).

If you would like to add an additional feature to multiple pages, you first need to add the new feature to one page using the steps outlined above; then follow the steps below to add the new feature to the remaining pages. You can also use the steps below on newly created pages to add a feature that's linked to the other features on your site.

1. On each additional page to which you'd like to add the feature, open the third (right) column for editing (either select the open page red dot in the center column, or select [Open 3rd Column] in the right column).

2. Select the "add/change news/events/features" multilink red dot in the right column.

3. From the Edit Link Element dialog window, select "Connect Existing Page."

4. Search for the feature you want to link to (use the page ID or try typing "feature" into the Headline field).

5. In the search results window, select the headline of your desired feature (learn more about what the green checks, wrenches, and red Xs indicate about the page).

6. The feature should now appear in your right column (information on altering the vertical position of the feature is available below).

7. Ask your QAer to republish the site in order to propagate your additions to the production server (this will not happen automatically).

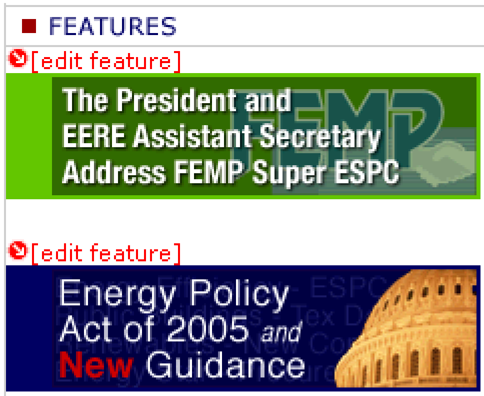
Replace an Existing Feature

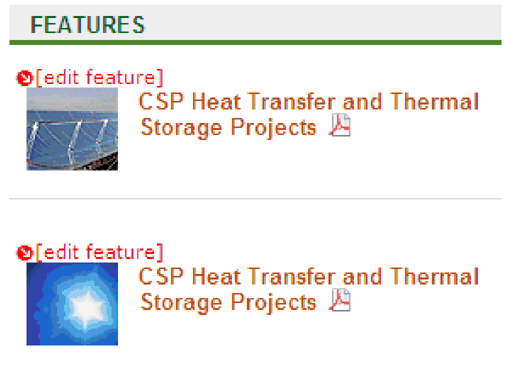
Use the steps below to replace an old feature with a new feature. ***Note:*** If your site uses the same feature on multiple pages, and the features are linked to each other (see the section above on adding the same feature to multiple pages), you can replace the old feature with a new one on a single page, and the change will propagate to all the other pages.

1. On the page on which you'd like to replace the feature, open the third (right) column for editing (either select the open page red dot in the center column, or select [Open 3rd Column] in the right column).

2. Select the "add/change news/events/features" multilink red dot in the right column.

3. Select the open page red dot above the feature you want to replace:





4. Replace the feature image:
   - Be sure your developer or QAer has already uploaded the new feature graphic to the staging server. Your developer or QAer should email you the site-relative URL to use in linking to your image.
   - Select the "edit image" red dot for the feature you want to replace; this will open the text editor. Select HTML .
   - Replace the existing site-relative URL with the new site-relative URL you received from your developer. The highlighted text is the text you will replace:

```
<IMG alt="The President and Assistant Secretary EERE Address FEMP Super ESPC"
src="/femp/images/feature_fempespc.gif" border=0><BR>
```

   - Edit the alt text so it corresponds with your new graphic:

```
<IMG alt="The President and Assistant Secretary EERE Address FEMP Super ESPC"
src="/femp/images/feature_fempespc.gif" border=0><BR>
```

   - Select "Design" to exit HTML mode; you should now see the new feature graphic.

5. Replace the URL your feature links to with the new URL:
   - Select the "edit link" single link red dot for the feature.
   - From the Edit Link Element dialog window, select "Assign URL" to link to a page outside of your site (then paste in the URL on the Assign URL dialog window). To link to a page within your site instead, select "Reference Page" (then search for the headline of the appropriate page in the resulting search dialog window).

6. Ask your QAer to republish the site in order to propagate your changes to the production server (this will not happen automatically).

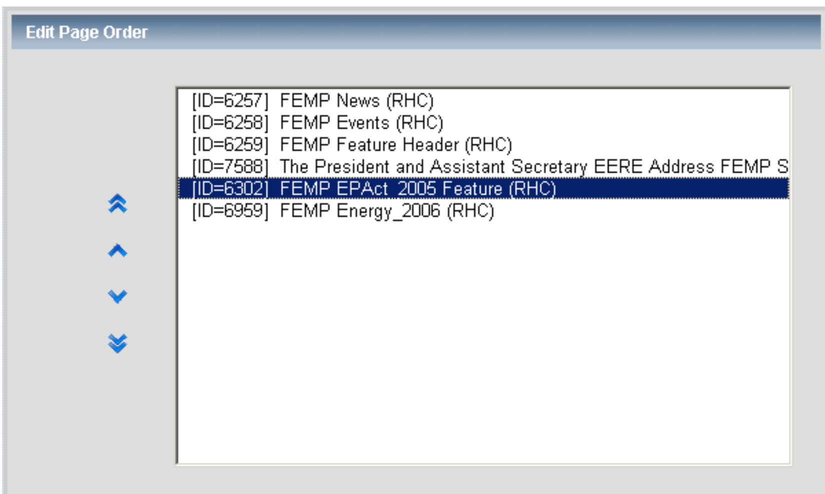
Alter Vertical Position of a Feature

1. On the page on which you'd like to alter a feature's vertical position, open the third (right) column for editing (either select the open page red dot in the center column, or select [Open 3rd Column] in the right column).

2. Select the "add/change news/events/features" multilink red dot in the right column.

3. From the Edit Link Element dialog window, select "Edit Page Order." ***Note:*** If you don't see "Edit Page Order" in the open dialog, please contact your EES representative (an OpenText administrator will need to update your permissions).

4. On the Edit Page Order dialog, select the feature you want to move, then use the arrows to change the page's location in the button stack:



5. Ask your QAer to republish the site in order to propagate your changes to the production server (this will not happen automatically).

Remove a Feature from One Page Only

If your site uses the same feature on multiple pages, and the features are linked to each other (see the section above on adding the same feature to multiple pages), you can remove that feature from one of the pages (but keep it on the rest) by following these steps:

1. On the page from which you'd like to remove a feature, open the third (right) column for editing (either select the open page red dot in the center column, or select [Open 3rd Column] in the right column).

2. Select the "add/change news/events/features" multilink red dot in the right column.

3. From the Edit Link Element dialog window, select "Remove Items from List."

4. Choose the feature you would like to remove, then select "OK."

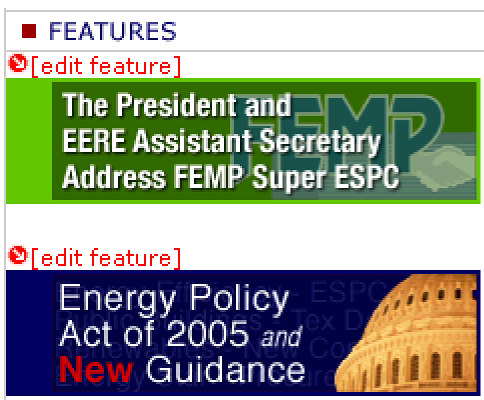
5. Ask your QAer to republish the site in order to propagate your changes to the production server (this will not happen automatically).

Delete a Feature

If you would like to remove a feature from all pages on your site, use the steps below:

1. On one of the pages displaying the feature you want to delete, open the third (right) column for editing (either select the open page red dot in the center column, or select [Open 3rd Column] in the right column).

2. Select the open page red dot above the feature you want to delete:



3. Follow the directions for deleting a page.

Add/Update Featured Publications

You can use the right column of your page to highlight publications that are related to the page's content. These publications are displayed in different ways.

You can simply list the publications, with or without a thumbnail image for each, under the Featured Publications header. In this treatment, the name of each publication links directly to the file:

You also can use the Featured Publications widget, which automatically connects the user with documents in the EERE Publication and Product Library, and also directs them to similar publications.

Add a Featured Publication

1. On the page on which you'd like to replace the feature, open the third (right) column for editing (either select the open page red dot in the center column, or select [Open 3rd Column] in the right column).

2. Select the "add/change news/events/features" multilink red dot in the right column.

3. From the Edit Link Element dialog window, select "Create and Connect Page."

4. From the List of Content Classes dialog window, select the "Publication" content class (or "Publication (no image)" if you do not want to use a thumbnail image).

5. On the Edit Headline dialog window, enter a headline for your new publication (although this headline will not show up on the live site, it will show up in OpenText search results, so it should be descriptive).

6. The framework for your new publication is now in place in the right column:

   [close publication]

   [edit image]
   [edit title]
   [edit link]
   [edit file type/size]

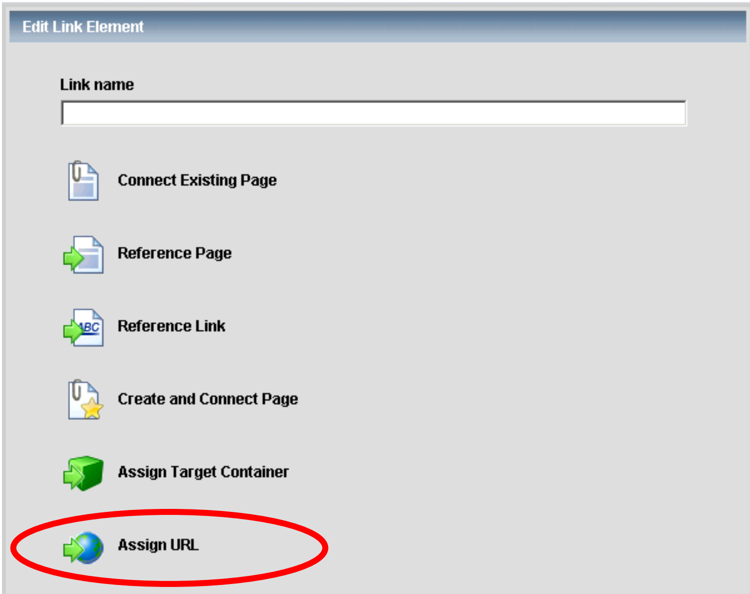
   Next, you need to add the appropriate image (if you are using one), title, and link.

   To add the image:
   - Be sure your developer or QAer has already uploaded the new image to the staging server. Your developer or QAer should email you the site-relative URL to use in linking to your image.
   - Select the “edit image” red dot for the new feature; this will open the text editor. Select HTML .
   - In place of the <P></P> you may see there, add an HTML image tag using the site-relative URL (be sure your image tag includes alt text): <img alt=“alt text” src=“site-relative URL”>.
   - Click “Design” to exit HTML mode; you should now see the new publication thumbnail.

   To add the title:
   - Select the “edit title” single link red dot for the new publication.
   - In the window that comes up, enter the name of the publication and click OK.

   To add the link:
   - Select the “edit link” single link red dot for the new publication.

- From the Edit Link Element dialog window, select “Assign URL” to link to a page outside of your site (then paste in the URL on the Assign URL dialog window):



To add the file size:
EERE standards no longer require the file size to be noted with PDFs and other document files, so the [edit file type/size] option will not apply if you are in the 2010 template. But if you are in the 2009 template, you will see placeholder information for the file size when the publication is first created. If want to change the file size, click on [edit file type/size] and enter “(PDF XX KB)” or the information that applies, then click OK. If you do not want to include the file size, enter a space in the field instead.

7. You have now added a simple publication to your right column. You will also need to add the Featured Publications header by returning to Step 1 above and choosing the “Publications Header” content class under Create and Connect a Page.

8. Once you have all of your publications in place, as well as the header, you can adjust the order of the elements by following the steps for altering the vertical position of a feature. If

you need to delete a publication, refer to the steps for deleting a feature. Also, the process for adding the same publications to multiple pages is the same as for features.

9. Submit each new publication to workflow; they will automatically publish to the staging server (http://www2.eere.energy.gov/xxx/). Check the publications on the staging server to be sure everything is correct.

10. Ask your QAer to QA and move the image up to the production server before releasing the related pages in workflow.

Add the Featured Publications Widget

1. Open the third (right) column for editing (either select the open page red dot in the center column, or select [Open 3rd Column] in the right column).

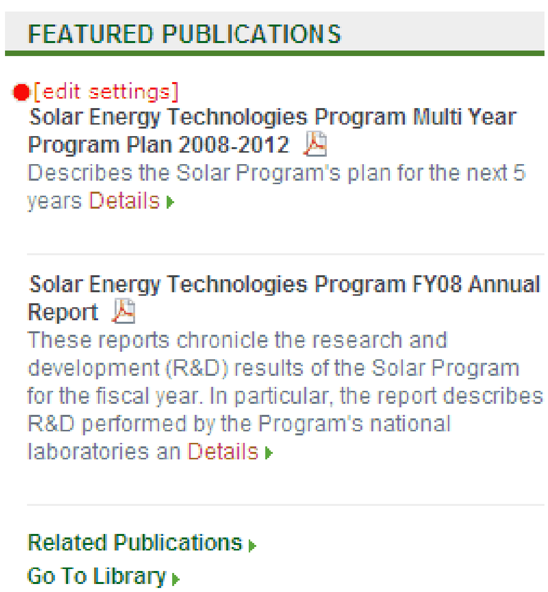
2. Select the "add/change news/events/features" multilink red dot in the right column.

3. From the Edit Link Element dialog window, select "Create and Connect Page."

4. From the List of Content Classes dialog window, select the "Related Publications" content class.

5. On the Edit Headline dialog window, enter a headline for your new widget (although this headline will not show up on the live site, it will show up in OpenText search results, so it should be descriptive).

   The framework for your new publication widget is now in place in the right column.



6. Click on [edit settings]. The EERE Catalog: Related Publications window will come up. Click on Add New Related Publications and complete the following steps:

   a) Choose whether to enter the product ID or a search term.
   b) On the next screen, enter the number of publications you wish to display.
   c) For the field below, enter either the product number or search term, then click on the Look up Related Publications button. If you choose to enter a product ID, the product for the ID that you enter will automatically be chosen for the widget, and the window will give you a list of the other available publications to choose for the other publications in the widget.
   d) Click the box next to the product name to choose it. Note that tagging a set of publications with the same tag makes it easier to select them all together in the CMS' Related Publications interface. Contact your EES representative or your program's library administrator to have publications given a specific tag.

7. After choosing the publications you want to display, close the EERE Catalog: Related Publications window by clicking on the "x" in the upper right-hand corner.

8. Click on the open page red dot to open the center content page again, and your related publications will now display.

Add the Feedback Widget and Access Its Data

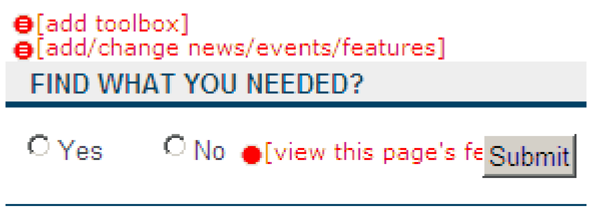
The feedback widget, which asks users if they found what they needed on a page, can be added to one page of your site or all pages of the site. Contact your EES representative to have the widget added to your page(s).

Access Feedback Widget Data for Individual Pages

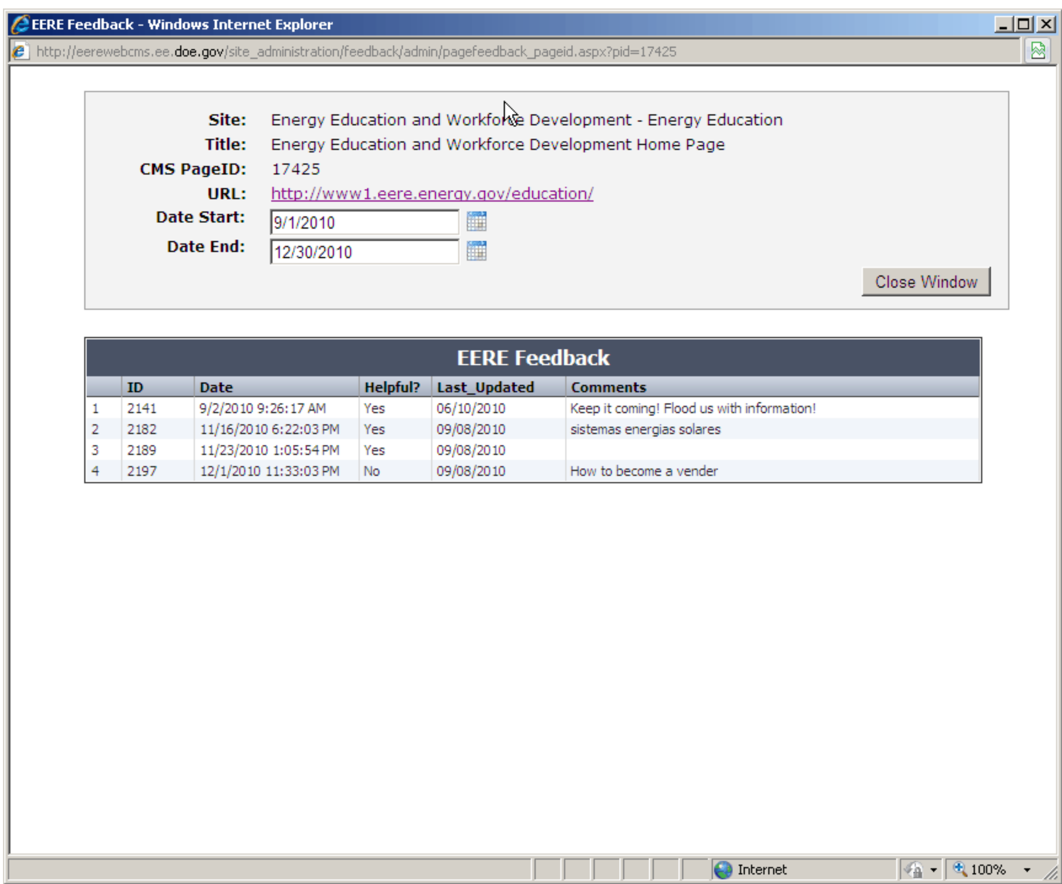
After the feedback widget has been added, follow these steps to access the data it has gathered for one page:

1. Navigate to the page in the CMS on which you want to access feedback widget data.

2. At the feedback widget in the right column, click on [view this page's feedback].



3. In the window that comes up, choose the timeframe for the feedback you wish to view, either typing in new dates in the Date Start and Date End fields or clicking on the calendar icon next to the fields. The feedback collected during that time period will appear under EERE Feedback below.



	ID	Date	Helpful?	Last_Updated	Comments
1	2141	9/2/2010 9:26:17 AM	Yes	06/10/2010	Keep it coming! Flood us with information!
2	2182	11/16/2010 6:22:03 PM	Yes	09/08/2010	sistemas energias solares
3	2189	11/23/2010 1:05:54 PM	Yes	09/08/2010	
4	2197	12/1/2010 11:33:03 PM	No	09/08/2010	How to become a vender

4. Click on the Close Window button to exit the window.

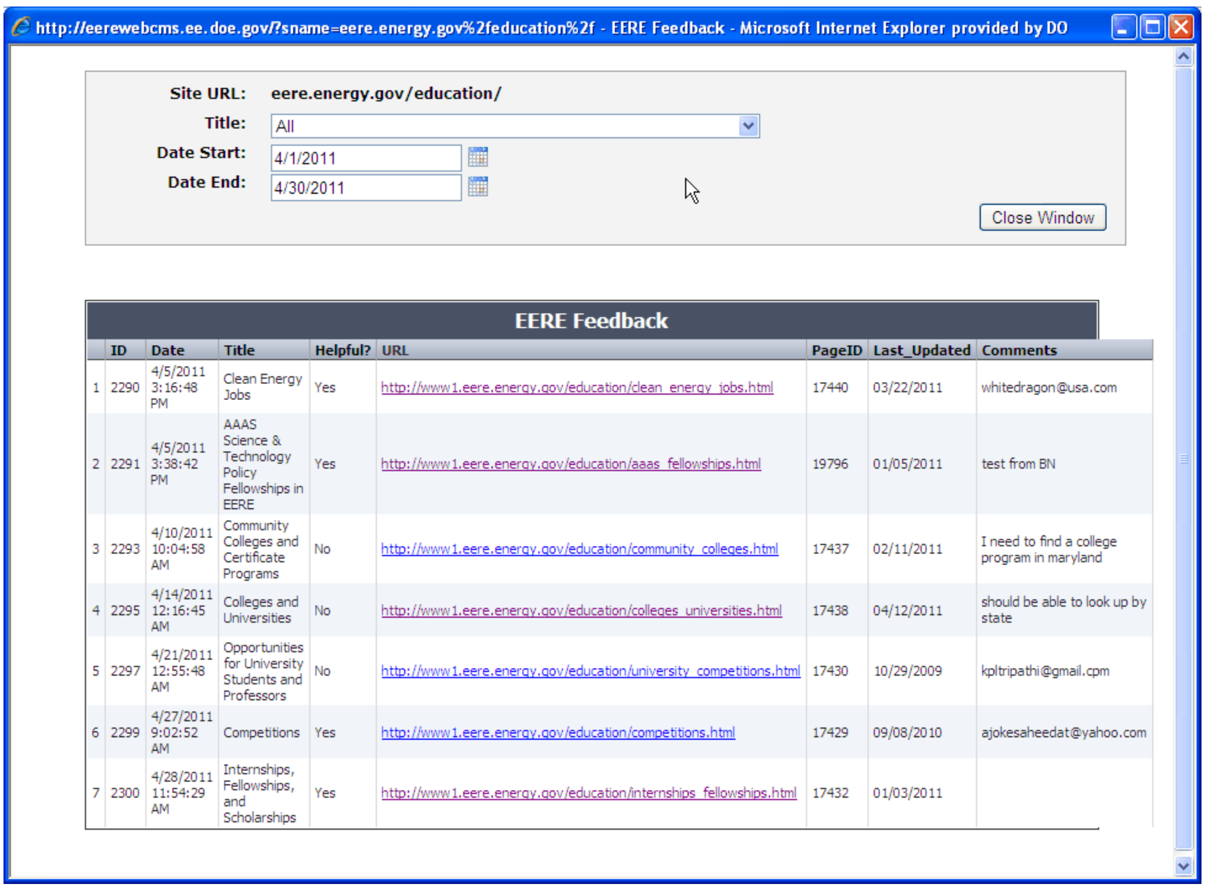
Access Feedback Widget Data for a Whole Site

After the feedback widget has been added to a whole site, follow these steps to access the data it has gathered:

1. Click on the open page red dot to open the home page of the site for which you want to access feedback widget data.

2. In the list of red dots at the bottom of the page, click on [view this site's feedback].

3. In the window that comes up, choose “All” from the Title pull-down menu, as well as the timeframe for the feedback you wish to view, either typing in new dates in the Date Start and Date End fields or clicking on the calendar icon next to the fields. The feedback collected during that time period will appear under EERE Feedback below.



	ID	Date	Title	Helpful?	URL	PageID	Last_Updated	Comments
1	2290	4/5/2011 3:16:48 PM	Clean Energy Jobs	Yes	http://www1.eere.energy.gov/education/clean_energy_jobs.html	17440	03/22/2011	whitedragon@usa.com
2	2291	4/5/2011 3:38:42 PM	AAAS Science & Technology Policy Fellowships in EERE	Yes	http://www1.eere.energy.gov/education/aaas_fellowships.html	19796	01/05/2011	test from BN
3	2293	4/10/2011 10:04:58 AM	Community Colleges and Certificate Programs	No	http://www1.eere.energy.gov/education/community_colleges.html	17437	02/11/2011	I need to find a college program in maryland
4	2295	4/14/2011 12:16:45 AM	Colleges and Universities	No	http://www1.eere.energy.gov/education/colleges_universities.html	17438	04/12/2011	should be able to look up by state
5	2297	4/21/2011 12:55:48 AM	Opportunities for University Students and Professors	No	http://www1.eere.energy.gov/education/university_competitions.html	17430	10/29/2009	kpltripathi@gmail.cpm
6	2299	4/27/2011 9:02:52 AM	Competitions	Yes	http://www1.eere.energy.gov/education/competitions.html	17429	09/08/2010	ajokesaheedat@yahoo.com
7	2300	4/28/2011 11:54:29 AM	Internships, Fellowships, and Scholarships	Yes	http://www1.eere.energy.gov/education/internships_fellowships.html	17432	01/03/2011	

4. Click on the Close Window button to exit the window.

Add/Update Quick Links

The Quick Links box is a navigation option that you may use to supplement your site’s standard left navigation. This feature is designed to provide additional navigation to content that is not included in the left navigation on that particular page. See the Left Navigation section of the Communication Standards site for specifics on how Quick Links can be used on your site.

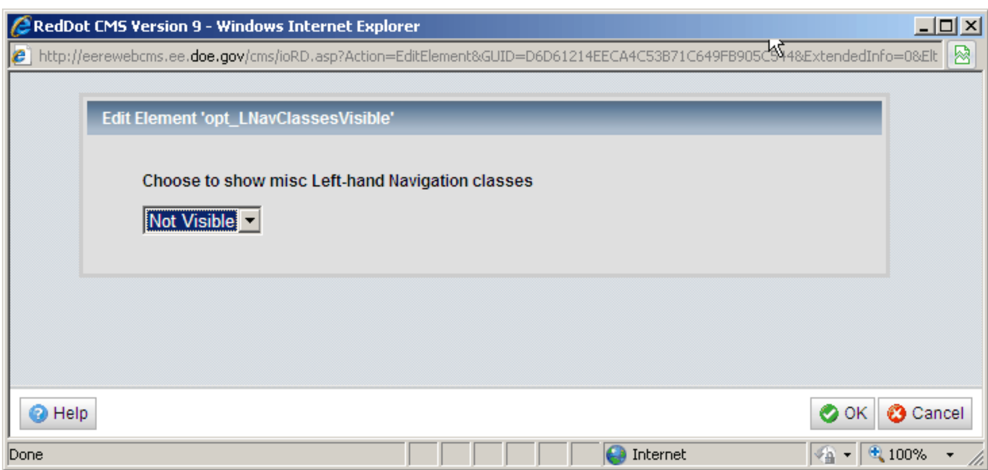
If you need help adding Quick Links to your site, or changing the content of your Quick Links, contact your developer or your EES representative. Note that the process can be done by a developer, but differs depending on where on your site you want to add the Quick Links, and how they have been implemented on your site. To add the box globally, throughout your entire site, for instance, you will need to contact your EES representative.

Here are the general instructions for adding and editing a Quick Links box on an individual page:

1. Click on the open page red dot to open the page on which you want to edit the Quick Links box.

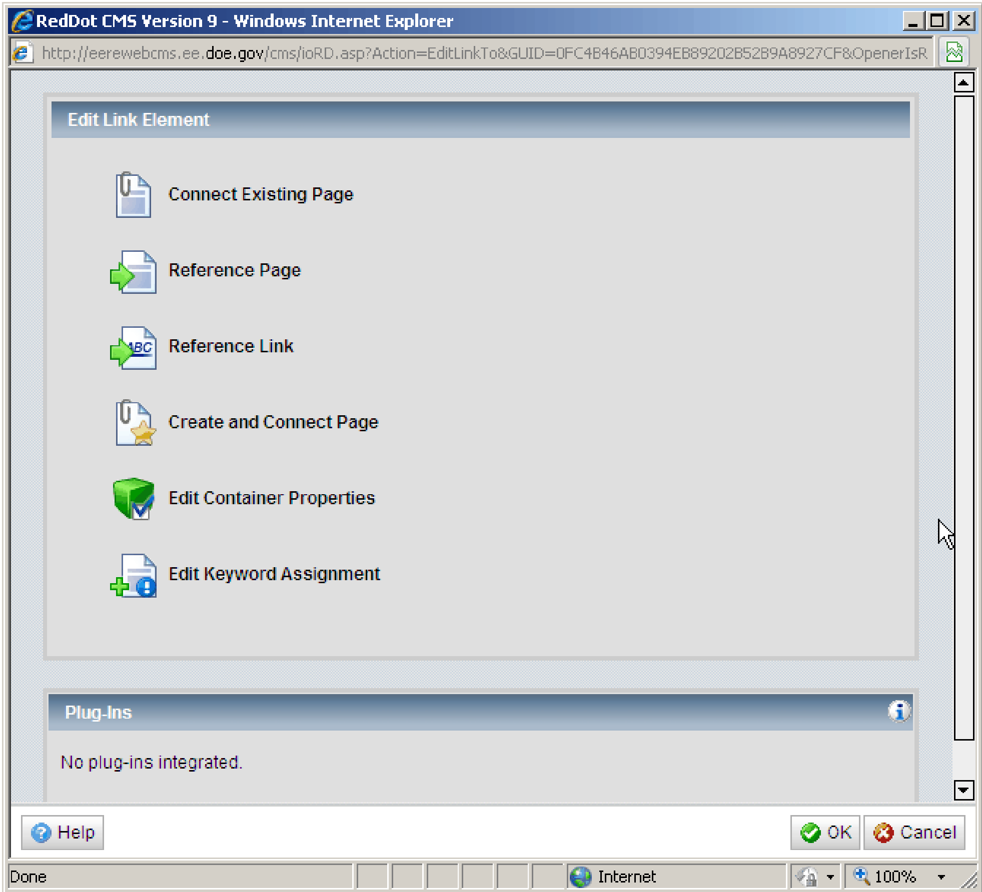
2. At the bottom of the page, click on [display other LHNav classes].

3. In the Edit Element 'opt_LNavClassesVisible' window that comes up, choose Visible under the pull-down menu for showing left-hand navigation classes.



4. Return to the page, and click on the [edit/add LHN items] option now visible in the left navigation.

5. In the Edit Link Element window, choose Create and Connect Page.



6. Choose Quick Links Listing in the List of Content Classes area.

7. Give the Quick Links box a name relevant to you (it won't be visible to the user). Click OK.

8. Return to the page, and the gray Quick Links box will now appear in the left navigation. Click on [add quick link].

9. Choose Create and Connect Page in the Edit Link Element window.

10. In the Edit Headline window, type the link text, then click OK.

11. Return to the page, and the text will now be visible in the Quick Links box. Click on [edit link] below the text.

12. In the Edit Link Element window, choose Assign URL.

13. In the Assign URL window, enter the URL for the page you're linking to, then click OK.

14. To add other bulleted links to the Quick Links box, repeat steps 8-13.

When you're done adding links, use the Tasks menu to submit each individual link, as well as the overall Quick Links box, to workflow in order to view the changes on www2, then release each item when they're ready to publish to the live server, www1.

Schedule Pages for Publication

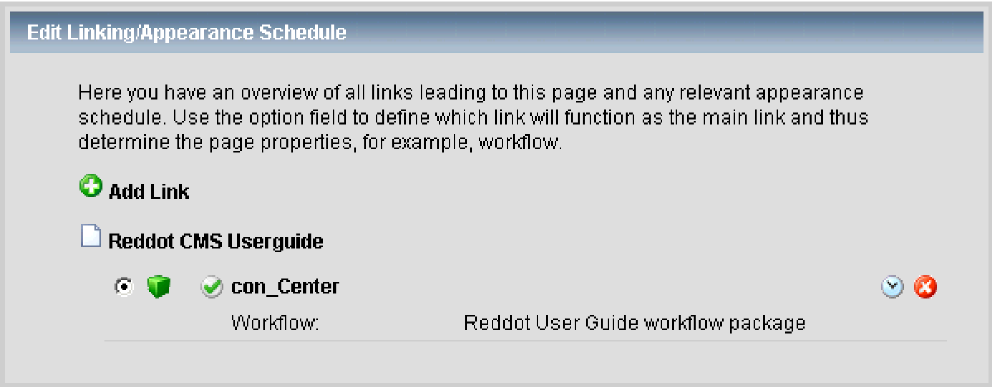
You can control when certain pages are visible on your live site using OpenText. This is especially useful for time-critical content like conference announcements, but this process has some drawbacks, which are noted below.

Add Appearance Schedule

1. Use the open page red dot to open the page you want to schedule.

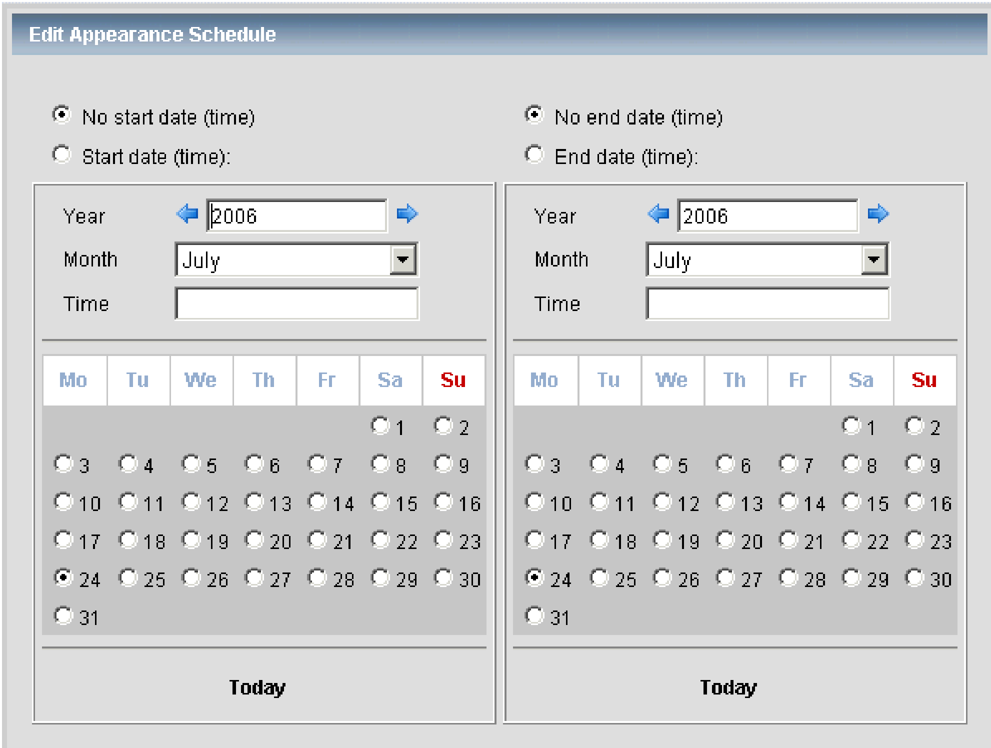
2. Select "Linking" from the page menu at the top of the page.

3. On the Edit Linking/Appearance Schedule dialog, you will see the parent page(s) from which the page you are on is linked (in general, each page will only have one parent):



4. Only pages linked via the multilink red dot at the bottom of the open parent page will appear here; additional links to your page that have been made through the text editor will not appear. Select Edit Appearance Schedule for the parent page on which you'd like to schedule a link to your page to appear. If you have multiple parent pages, you can schedule the links on different parent pages to appear and expire at different times, if desired.

5. On the Edit Appearance Schedule dialog, select the dates and times that the link should appear on the affected page:



6. Be sure to submit both the parent and the child pages to workflow.

7. If you have set a date for the link to your page to expire, a publishing job will run and remove the link from the parent page's Multilink red dot, as well as from the left navigation. ***Note:*** It will NOT remove links that have been established from the center content area on the parent page (or the associated content); you will have to manually remove these links as soon as the publishing job has run.

Delete Appearance Schedule

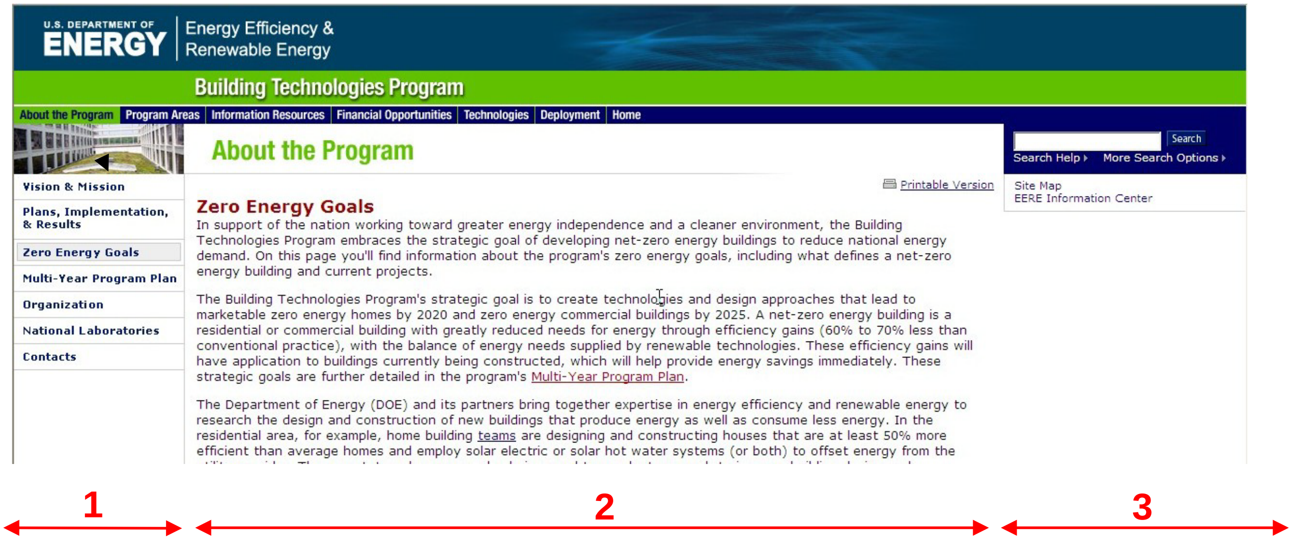
1. Use the open page red dot to open the page you want to schedule.

2. Select "Linking" from the page menu at the top of the page.

3. On the Edit Linking/Appearance Schedule dialog, select "Delete Appearance Schedule."

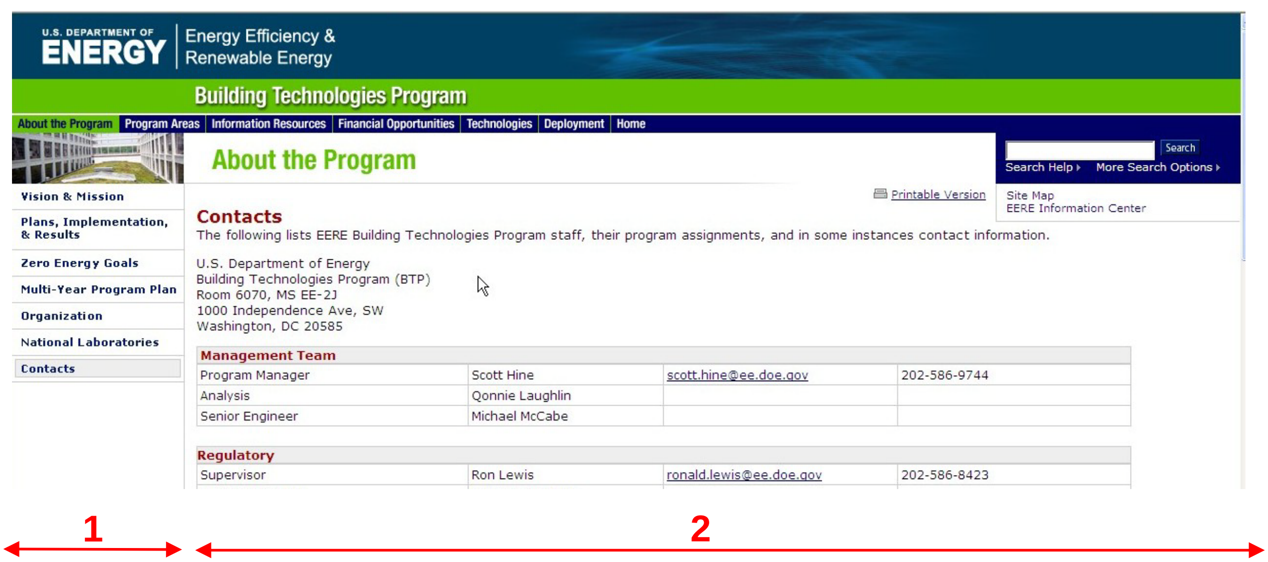
Switch to Wider Page Layout

When you look at the layout of your website, you will notice that it is divided into three columns – the left navigation occupies the first column, the page content occupies the second column, and the third column is either filled with news and features or it is blank:



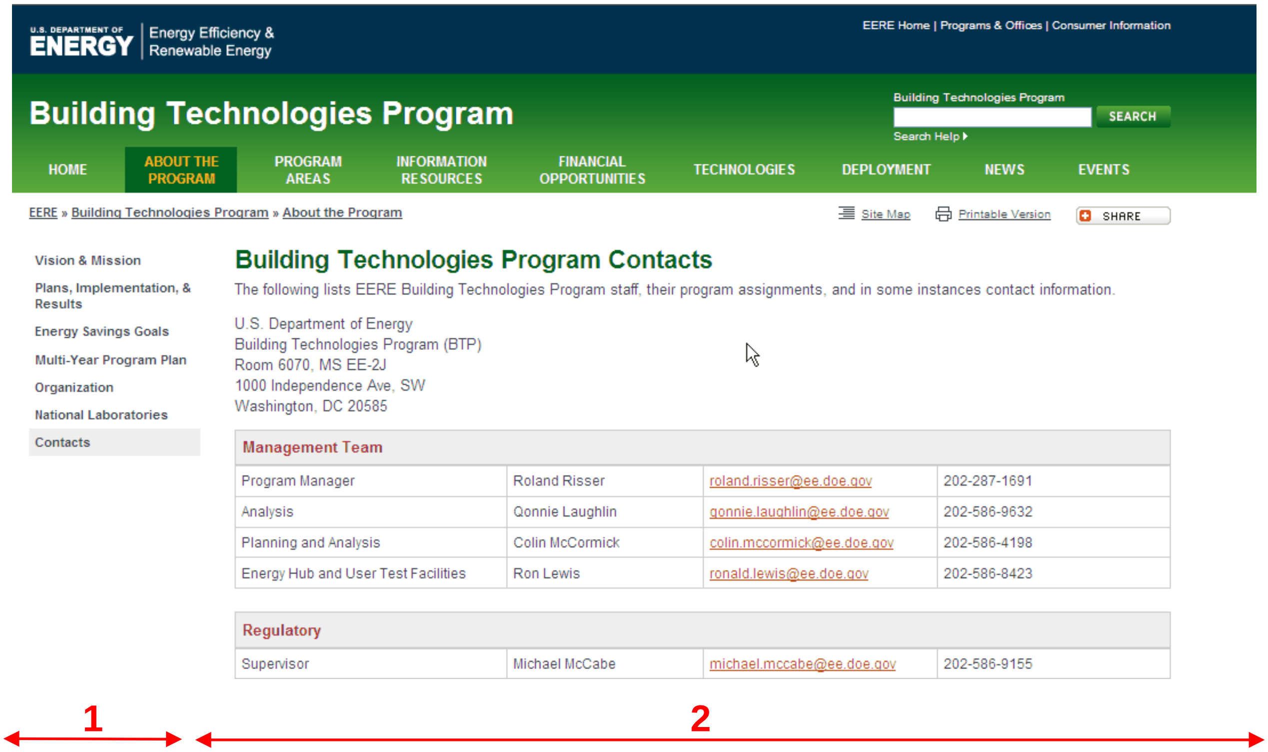
The three-column layout described above is the default layout for all EERE pages in the old 2009 template. In the three-column layout, any graphics or tables that you add to the center content column must be no wider than 535 pixels.

If you have a graphic or table that is wider than 535 pixels, and your third column is currently blank, you can switch to a two-column layout. In the two-column layout, the left navigation still occupies the first column, but the content from the second column expands to fill the second and third columns:

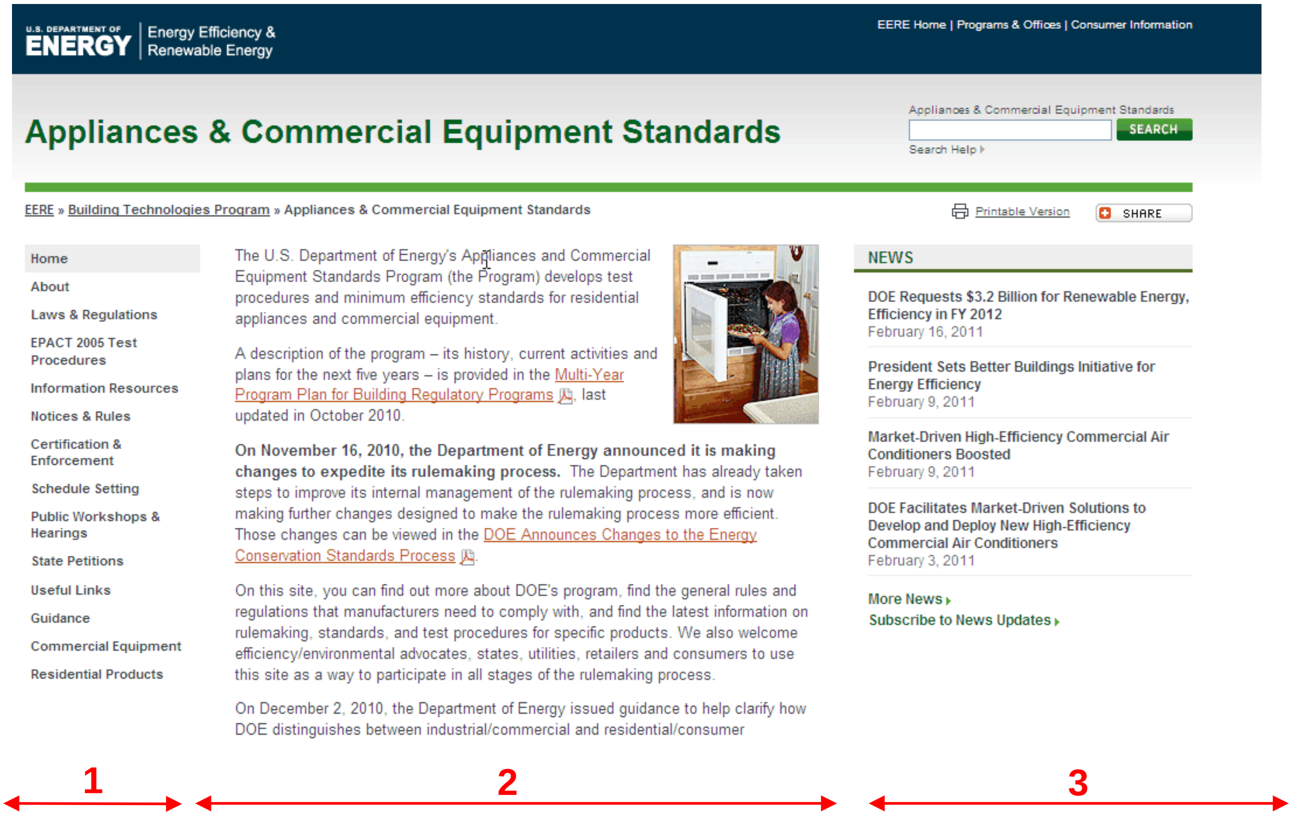


Using the two-column layout, you can incorporate graphics or tables up to 695 pixels in width.

In new new (2010) template, the widths change slightly:



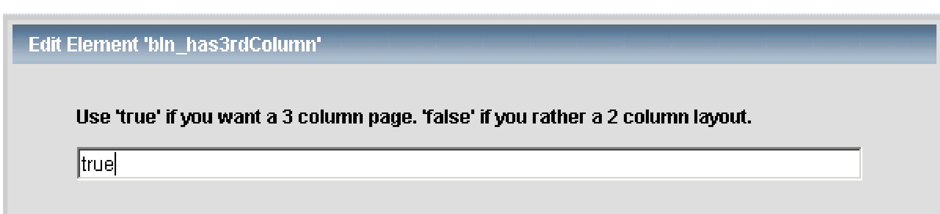
Using the two-column layout, you can incorporate graphics or tables up to 680 pixels in width.



In the three-column layout of the 2010 template, any graphics or tables that you add to the center content column must be no wider than 500 pixels. Note that for this newer template, the default will be two columns, unless the third column is needed for content.

Here's how to switch from a three- to a two-column layout or vice-versa:

1. Use the open page red dot to open your page.
2. Scroll to the bottom of the page, then select [convert to 2-column mode].
3. On the Edit Element dialog, type in "false" for a two-column layout, or type in "true" if you are switching to a three-column layout:



4. Select "OK."

Edit the Mobile Variant

In 2010, mobile device-friendly versions were added for all EERE sites in the CMS. Follow these steps to access and edit the mobile variant for a particular page. Note that once a mobile variant for a page is established / changed, the content on the page will need to be manually synchronized with the content on the page's standard, full-size version.

1. Use the open page red dot to open your page.
2. At the bottom of the page, click on [view mobile variant].
3. On the mobile version page, click on [Edit Page Content].
4. If the page already has an established alternate mobile page, choose [Edit mobile content]. If this is the first time you're editing the mobile version (and are thereby now establishing the alternate mobile page), first copy the content or HTML code from the standard page. Then click on [page has alternate mobile version?(this page only)? yes/no]. Choose Yes. ***This will delete all the content from the page.*** Then choose [Edit mobile content]. You can now paste the text from the standard page into the text editor window and begin editing from there, or you can start entering fresh content on the blank page.

●●● Create, Connect, Archive, Delete Pages ●●●

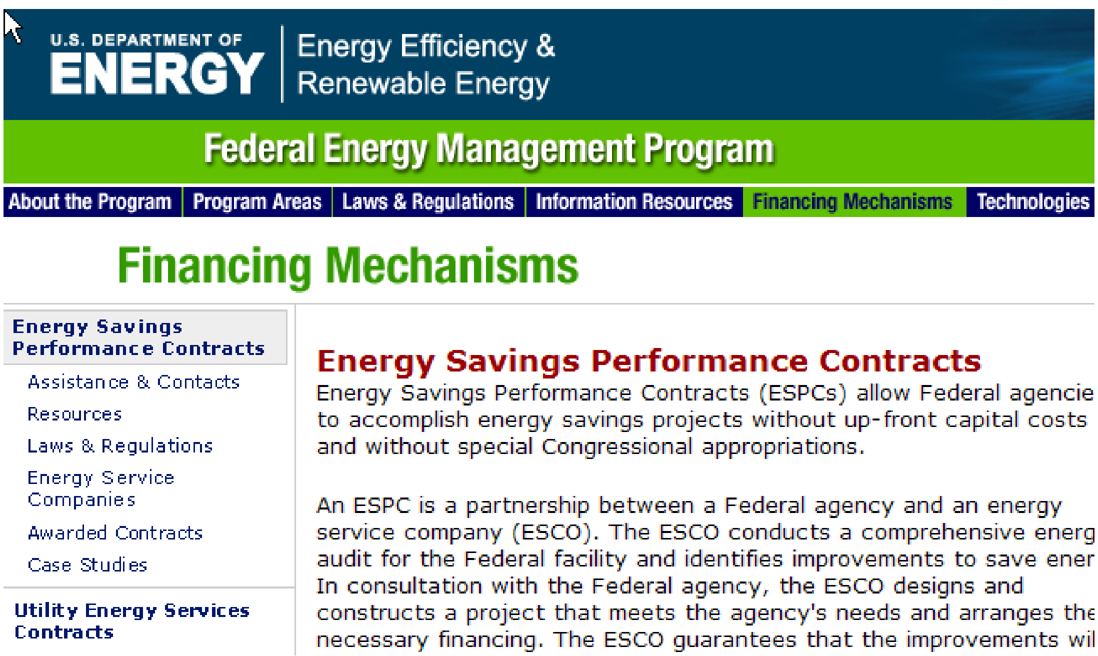
The information in this section will help you create, connect, move, save, or delete pages.

Decide How to Connect a New Page

Before you add a new page to your site, you'll first need to determine the parent page, and then decide how you want to connect the new page.

Determine the Parent Page

All pages must have a parent page. The parent page is the page under which the new page will reside. In the example below, "Energy Savings Performance Contracts" (level 1) is the parent for "Assistance & Contacts" (level 2):



Note: For the navigation to work properly, the parent for all fourth-level *and below* pages should be the third-level page.

Determine How You Want to Connect the Page

You can choose to connect your new page from the left navigation, or you can connect it via a link from the parent page's center content area. In making your decision, consider:

- Where the new page falls in the site hierarchy. For example, is it a first-, second-, or third-level page? If so, it could be connected via the left navigation. If it is a fourth-level page or below, it must be connected via a link from the center content area, per the EERE Web standards (learn more about how left navigation works in the EERE template, and be sure to have any new navigation labels approved by the EERE Information Architecture Team).

- Whether the page will be a long- or short-term addition to the site. For short-term additions, you might want to consider linking from the center content area; first- through third-level, long-term additions should be linked from the left navigation.

Once you have made your decision, you can create and connect your new page.

Create and Connect a New Page

Once you have determined where your new page will live on the site, and you've decided how you want to connect the page to the site (via the left navigation or from the center content area), use the information below to create and connect your new page.

Create Page Connected to Left Navigation

Step 1 – Create the Page

1. Select the open page red dot of the parent page (the main page to which your new, child page will be linked). ***Note:*** For the navigation to work properly, the parent for all fourth-level *and below* pages should be the third-level page.

2. Scroll to the bottom of the parent page and select [add, sort, remove sub pages].

3. From the Edit Link Element dialog window, select "Create and Connect Page."

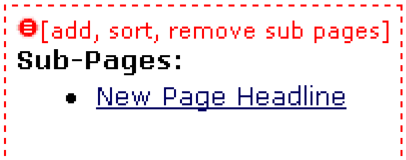
4. From the List of Content Classes dialog, select the content class (template) you'd like for your new page (in most cases, "Program/Subsite Center Content" will be your only choice).

5. On the Edit Headline dialog, enter the headline for your new page. This will become the page header, and it will also be used in the title tag. Both the page header and the title tag (as well as your content) are used by search engines to rank your page, so be sure your headline describes your page content and uses terms people would use in searches. Learn more about optimizing your content to improve search engine ranking.

6. You have now created a new child page under your chosen parent page. To verify, scroll back down to the bottom of the parent page; the headline for the new page should appear under the Multilink red dot.

Step 2 – Connect the Page to the Left Navigation

1. Navigate to the new page by selecting the headline of the new page, which appears as a link under the parent page's Multilink red dot:



2. Select the new page's open page red dot .

3. Select "Actions" from the page menu at the top of the page.

4. From the Plug-ins dialog window (at the bottom of the Actions menu), select "Add to Navigation."

5. From the Add this Page to the Navigation dialog, enter the navigation name. If the site still has image-based navigation (which is the case for many sites in the 2009 template), this is the alt text that will display when someone mouses over the navigation button; it should match the text on the navigation button (and the page headline, if short enough). For 508 accessibility reasons, be sure to use "and" instead of "&" when creating the alt text. If the site has text-based navigation (2010 template), this is the text that will display for that item when it publishes out to the live server.

6. For image-based navigation, you will now see an image placeholder for your new page in the left navigation. (If you are simply reconnecting an existing page, the navigation image should already be in place at this point.) If your site is in the 2010 template, you will see the label name appear in the left navigation. Move the page to the correct place in the button stack by changing the left navigation order. Before you submit a page with image-based navigation to workflow, ask your developer to create and add a left navigation button for you. Note that changes to the left navigation do not propagate through that section of the site until you publish the whole section is out to the live server.

Step 3 – Add the File Name

Although OpenText has a numerical system for naming pages, you can and should establish a file name for every page on the site. The file name (e.g., "buses") appears as part of the page's URL (e.g., /education/buses.html). Because of this, it is inadvisable to change established file names if possible, since the change will break links others have established to the page.

Caution: Be sure you choose a file name that is not already in use within your site's directory. If you accidentally choose one that has already been used, OpenText will overwrite the content on both pages with the content of the new page. There is currently no automated way for OpenText to detect if a page name has already been used on the site.

Follow these steps to add or change a file name:

1. Select the open page red dot on the page on which you would like to add a file name.

2. Select "Properties" from the page menu.

3. On the Edit Properties dialog, fill in the "File Name" field. See the file naming conventions in the EERE standards for guidance on developing a useful file name.

4. Republish the site to production (must be completed by a QAer). This ensures that your file name change propagates to the live server (simply sending the page through workflow will not change the file name on the production server). In addition, OpenText will automatically update any links to your page that were created using OpenText URLs. Note that it may take longer for the new file name to appear on the live server than it does for other page edits.

Step 4 – Add Content to the New Page

1. Select the new page's open page red dot .

2. Select the appropriate edit red dots to add content to your page (see Using the Red Dots and Using the Text Editor for more information).

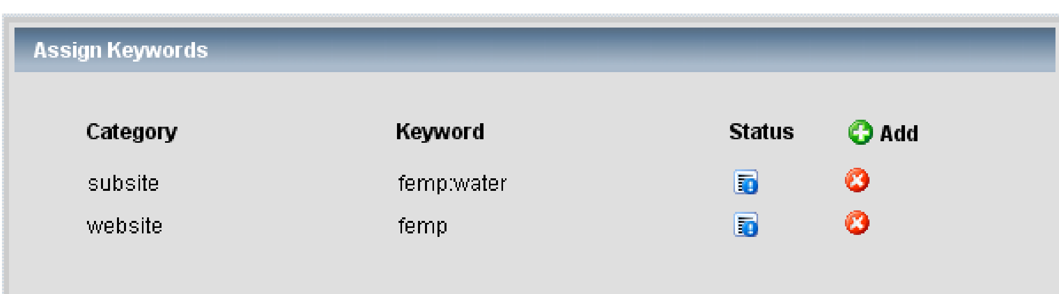
Step 5 – Verify Keyword(s) on the New Page

All new pages on your site must have keywords so they will be included in search results. Use the process below to verify that your new page has keyword(s), and that they are appropriate to your site (see the table of keywords if you're unsure what your site's keywords should be):

1. Select the new page's open page red dot .

2. Select "Keywords" from the page menu.

3. From the Assign Keywords dialog, verify that there is a keyword in the website category, and if applicable, in the subsite category:



Note: Keywords are assigned as sites are migrated into OpenText. When you create new pages, keywords should be applied to those pages automatically. If you find that there is no keyword(s) on your new page, notify your EES representative so they can troubleshoot the keyword inheritance process for your site.

Create Page Connected via Center Content

Step 1 – Create the Page

Follow the first step above for creating a new page.

Step 2 – Connect the Page via the Center Content

1. Scroll back up to the top of the parent page.

2. Select the edit red dot ● to open the text editor.

3. In the text editor, follow the instructions for adding links to pages within your website to create a link to your new page.

Step 3 – Add the File Name

Follow the instructions above for adding the file name.

Step 4 – Add Content to the New Page

1. Navigate to the new page by selecting the link to the page that you just created in the text editor.

2. Select the new page's open page red dot.

3. Select the appropriate edit red dots ● to add content to your page (see Using the Red Dots and Using the Text Editor for more information).

Step 5 – Verify Keyword(s) on the New Page

Follow the instructions above to verify that the keywords have been automatically added to your new page.

Move a Page (or, Connect an Existing Page)

OpenText also provides the ability to move a page from one part of your site to another part. This is done by disconnecting the page you want to move from the original parent, and then using the Connect Existing Page function to reconnect the page to a different part of your site, under a new parent.

Follow the steps below to move a page:

1. Select the open page red dot of the original parent for the page you want to move.

2. Scroll to the bottom of the parent page and select [add, sort, remove sub pages].

3. From the Edit Link Element dialog window, select "Remove Items from List."

4. From the Remove Items from List dialog, select the page you want to disconnect, then select "OK." **Be sure the site does NOT get published to the staging or production servers after you have disconnected the page, but before you have reconnected it.** If this happens, the disconnected page will be removed from the servers, but any links to the page are preserved (and broken).

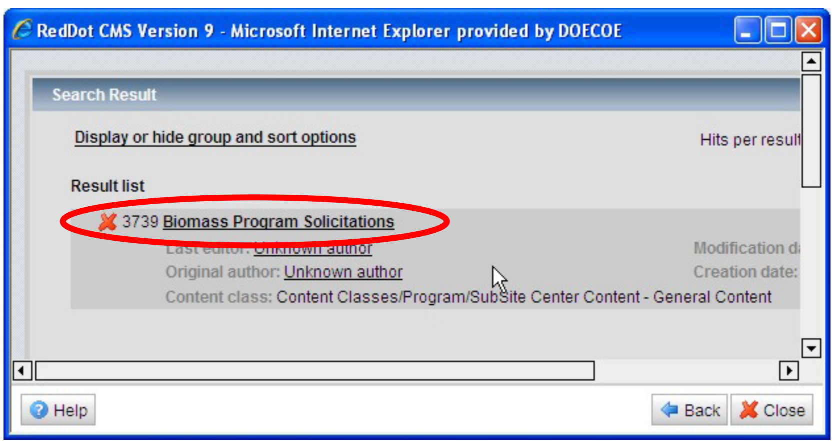
5. Select the open page red dot of the new parent page (the page to which you want to connect the page you are moving).

6. Scroll to the bottom of the parent page and select [add, sort, remove sub pages].

7. From the Edit Link Element dialog window, select "Connect Existing Page."

8. Search for the page you want to link to using the headline, page ID, or words from the text, for example.

9. In the search results window, select the headline of your desired page (learn more about what the green checks, wrenches, and red Xs indicate about the page):



10. The linked headline of your page now shows up under the [add, sort, remove sub pages] multilink red dot of the parent page.

11. Decide how you want to connect your page to the parent page, and then follow the instructions for connecting a page to the left navigation or connecting the page via the center content.

Delete a Page

When you are sure you will no longer need a page on your site, you can delete it. Once a page has been deleted from your site, it is no longer accessible to website users, and it is no longer available to be relinked to your site.

Use the steps below to delete a page:

1. Select the open page red dot of the page you would like to delete.
2. Select "Actions" from the page menu at the top of the page.
3. From the Page Actions dialog window, select "Delete Page."
4. The Delete Page dialog provides a count of pages that currently have links established to the page you wish to delete:

5. Select "Yes." You can also choose to see details of the pages that link to the page you are deleting. ***Note:*** When you delete a page, OpenText runs a publishing job to remove all links from other OpenText pages to the deleted page. However, it does not remove the linked text; this must be removed manually. So when a page is deleted, editors of other pages that had links established to the deleted page will receive an email alerting them that a page has been deleted, and that they need to remove the formerly linked text from their page.
6. Select "SmartEdit" from the editing menu to navigate to another page for editing.
7. Ask your QAer to republish the whole site in order to remove the page and its left navigation button from the production server (this will not happen automatically). You also may need to ask your EES representative to remove the page files from the directories on www1 and www2.

Archive a Page

Under certain circumstances, you may need to archive a page. For example, if you post a survey for a short period of time each year, then remove it and repost the same survey the following year, you would want to remove the survey, but keep it archived so that it's available to you next year.

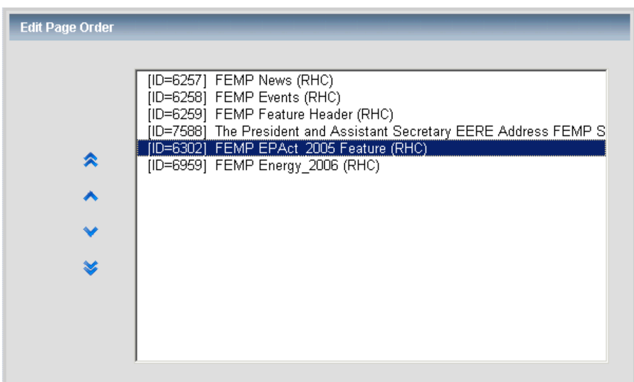
To archive a page, send the name of the page (page headline) to your EES representative. Once an OpenText administrator has archived the page, you should delete the page from your site.

When you want to reuse the archived page, let your EES representative know which page you need, when you need it, and where you want to have it linked.

Change Left Navigation Order

When you add a new page to the left navigation, OpenText initially places it above the other child pages linked under a common parent page. If you would like to move the left navigation label to a different location in the stack, follow the steps below:

1. Select the open page red dot of the parent page (the page to which your child page is connected).
2. Scroll to the bottom of page and select [add, sort, remove sub pages].
3. From the Edit Link Element dialog window, select "Edit Page Order."
4. On the Edit Page Order dialog, select the page you want to move, then use the arrows to change the page's location in the stack:



Remove a Left Navigation Label

When you delete a page or disconnect it to move it, OpenText automatically removes the left navigation label that accesses the page.

If you would like to remove the left navigation label without disconnecting the page from the parent page's Multilink red dot (for example, if you decide to connect the child page from the center content area instead of from the left navigation), use the steps below:

1. Select the open page red dot on the page whose headline matches the navigation label you want to remove.
2. Select "Actions" from the page menu.

3. From the Plug-ins dialog window (at the bottom of the Actions menu), select “Remove from Navigation.”

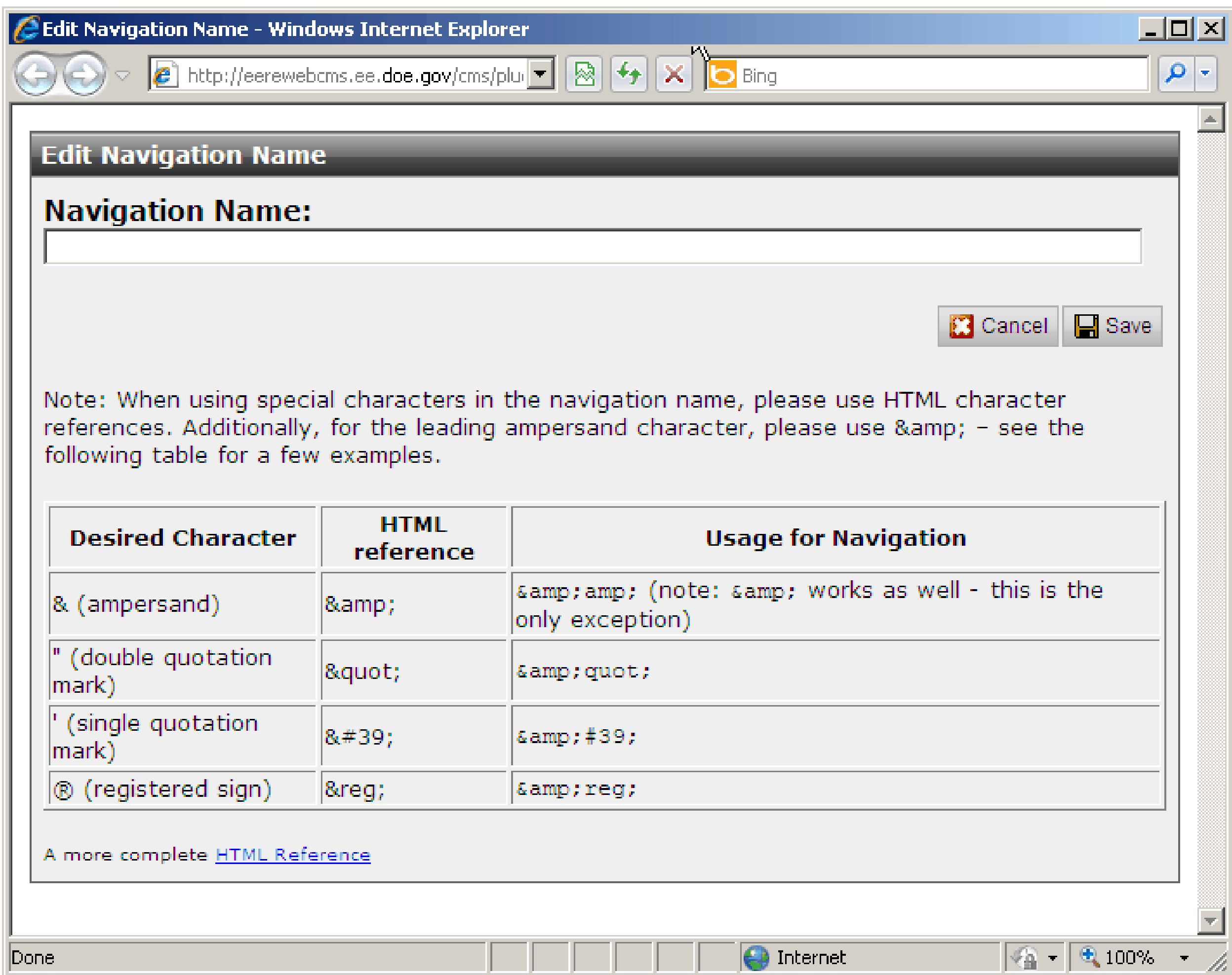
Edit Text-Based Left Navigation

First of all, your site needs to have text-based navigation enabled. Contact your EES representative if you want this enabled for your site. (If the site will remain in the image-based left navigation for now, see Add or Change a Left Navigation Graphic.)

1. Select the open page red dot at the page for which you want to edit the navigation label.

2. Scroll to the bottom of the content and click on [edit navigation name].

3. In the Edit Navigation Name window, enter the new navigation name. Be sure to use HTML references for any special characters (&, ", ' …). See the instructions on HTML references and special characters in the popup window.



4. Click Save. The new name will show up in the left navigation when the page is released to the live server.

••• Publish Pages •••

This section provides information about the process for publishing pages to the staging and production servers.

Introduction to Workflow

"Workflow" is the approval process that modified or newly created pages go through in order to be published to the live website. You can review the status of pages currently in workflow for a particular site by selecting the Homepage button from the general menu.

Your site's workflow can be customized to best meet the needs of those responsible for editing and approving your site. Here's a sample workflow process, to give you a feel for how workflow works:

1. An editor alters a page and submits it to workflow.

2. The QAer(s) receive an email requesting the page to be QAed and sent live. If acceptable, the page is released and published on the live site. If the page requires modifications, the QAer can make the requisite changes and then release the page, or reject the page. If rejected, an email will be sent back to the editor requesting additional changes (the page needs to be resubmitted to workflow once appropriate changes have been made).

Note that any changes to the site that require the involvement of the site developer are handled through regular phone/email channels, and not through the OpenText workflow system.

Different people play different roles in the development and maintenance of any website; in the OpenText workflow system, these roles are strictly defined and tied to a series of permissions. For example, editors can edit pages, but only QAers can send pages live.

Workflow Roles and Responsibilities

Below you'll find descriptions of the roles necessary to modify and send pages live using the OpenText CMS; each role has different permission levels and different functions. Note that a single person may play multiple roles, or multiple people may fill a single role for each site. Not all roles will be used for every site. See Introduction to Workflow (above) to learn more about how the workflow process works.

SmartEditor

- Make changes to a page and add/delete pages.
- Submit new or altered pages for approval.

Developer *(these tasks are sometimes folded into the SmartEditor role)*

- Make changes to a page and add/delete pages.
- Add and change page names (affects the URL).
- Change, add, or delete left navigation graphics.
- Work with EERE template coordinator to gain approval from EERE Information Architecture Team for navigation changes.
- Upload PDFs, images, and other assets to the staging server.
- Fine-tune source code in text editor so images and other features display properly.

Quality Assurance (QA) Tester

- Evaluate pages and assets based on EERE Web standards.
- Accept, make changes to, or reject pages modified by editors and developers (accepted pages are published to the production server).
- Upload PDFs, images, and other assets to the production server.

Note: This role includes all of the permissions given to developers.

Power User

- Edit, approve, QA, and send live all pages on the site (people in this role can perform the functions of all the other roles except OpenText administrator).

OpenText Administrator

- Set up and manage OpenText user accounts, workflow, user permissions, publication package, and master templates.
- Create and manage master directory structure for EERE sites.
- Create new site templates so developers can build out sites using OpenText's editing tools.

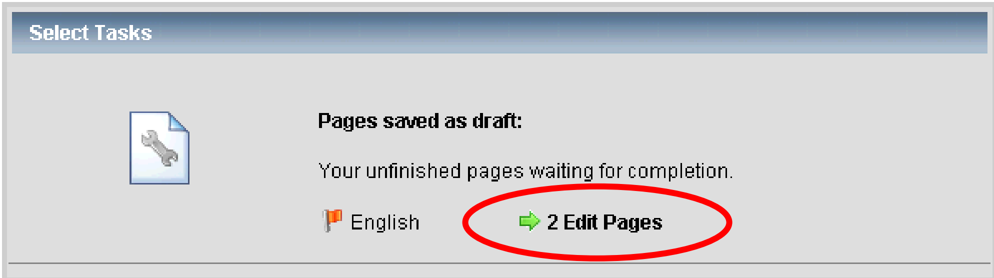
Pages Saved as Draft

When you create a new page or edit the contents of an existing page, the page is "Saved as Draft." This means that the page is still in your workspace, and you are the only person who can see the changes you've made. The page is also checked out to you, so you are the only one who can edit it.

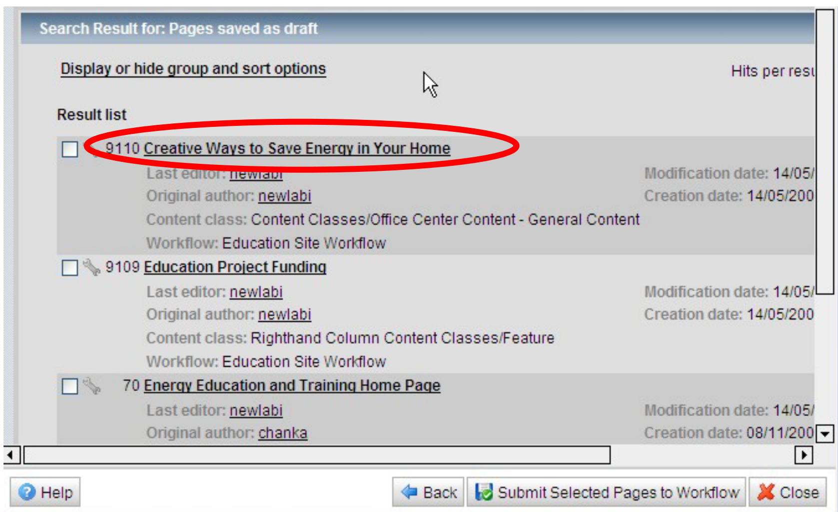
You can view the pages you've saved as drafts in the following way:

1. Select Tasks from the editing menu (you can also see a list of your pages from the Homepage).

2. Select "X Edit Pages" under the "Pages Saved as Draft" section of the Select Tasks dialog window:



3. Select the linked page headline to go to the page you've saved as a draft:



Once you are finished making changes, you can start the publication process by submitting your page to workflow.

Submit Pages to Workflow

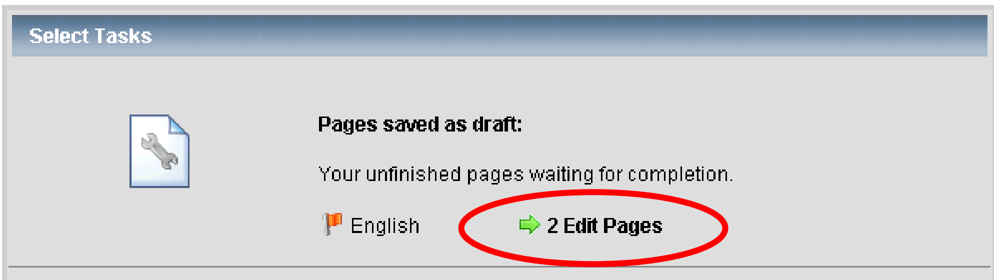
Once you are finished making changes to a new or edited page, you need to submit it to workflow to start the publication process. Below you'll find information on two methods for submitting a page to workflow.

Submit Pages using the Tasks Menu

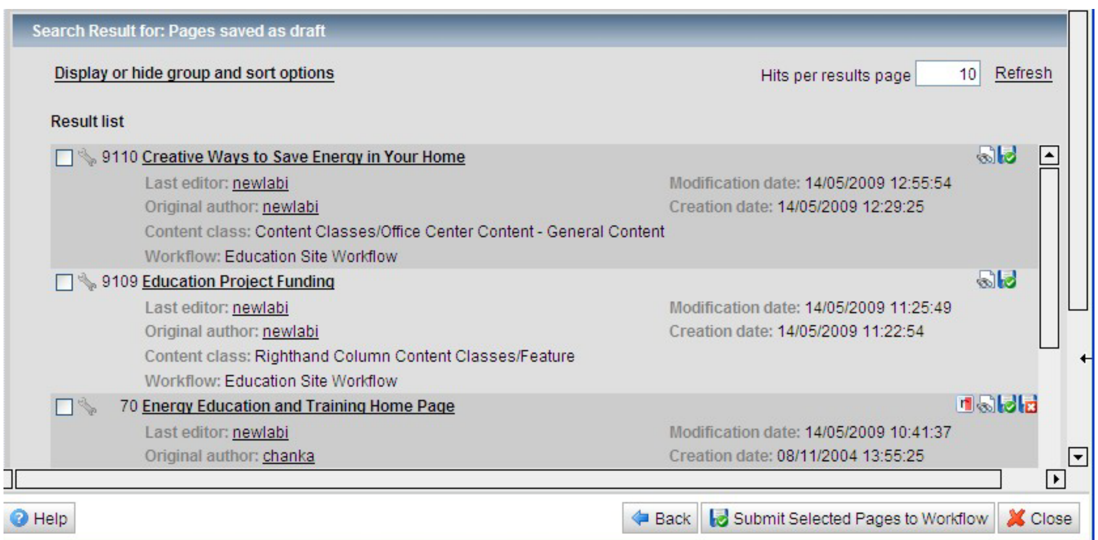
Use this method if you are submitting more than one page, if you have multiple workflow tasks to perform, or if you want to compare page versions.

1. Select Tasks from the editing menu.

2. From the Select Tasks dialog window, select "X Edit Pages" under the "Pages Saved as Draft" section:



3. On the Pages Saved as Draft dialog, you will see a list of the pages available to submit to workflow:



You can use this dialog to:

- **Preview the page.** This shows you the page as it will look on the production server.
- **Compare versions.** Previewing the page in redlining mode allows you to compare the version currently published with the version you have edited. Content that was removed is shown in ~~red strikethrough~~. Content that was added is shown in green highlight. This feature is only available for changed pages, not for new ones.
- **Undo changes.** If you decide you prefer the current published version of the page to the version you have edited, select this button to undo any changes you have made since

the last time the page was published. The page will no longer be "Saved as Draft." This feature is only available for changed pages, not for new ones.

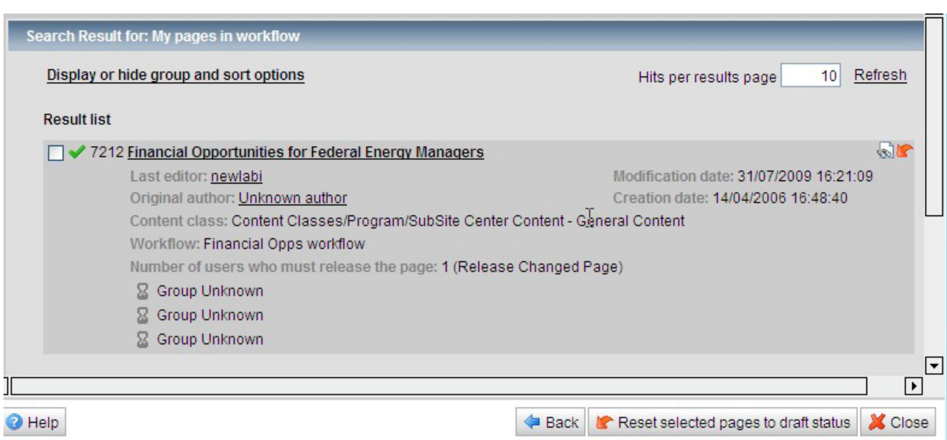
-  **Submit to workflow.** Select this button to start your page moving through the publication process. When you submit a page to workflow, the page is automatically published to the staging server (http://www2.eere.energy.gov/xxx/), where it can be reviewed before going live; in addition, OpenText notifies your QAer that a page is waiting for review. **Please note that automatic publishing only occurs the first time a page is submitted to workflow**. If you withdraw the page from workflow, make additional edits, and resubmit the page, you'll need to ask your QAer to manually republish the page to the staging server before going live).

  Note: If there are new PDFs or images associated with your page, you'll need to email your QAer at this point and ask him/her to QA the assets and move them to the production server BEFORE releasing the page to the production server.

  You can select multiple pages for submission by checking the boxes to the left of the page headlines, then selecting "Submit Selected Pages to Workflow" at the bottom of the dialog.

4. To see a list of all the pages you have submitted to workflow, select  to go back to the main Tasks menu. You'll now see an extra category called "My Pages in Workflow." Select "X Edit Pages:"

The "My Pages in Workflow" dialog will display information on the pages you have submitted for approval, and who needs to approve them:



Your page will remain in this category until your QAer approves or rejects the page. You can use this menu to preview the page (select the page header), or to withdraw your page from workflow.

Submit a Page using the Page Menu

Use the page menu to submit your page if you are only submitting a single page.

1. Select the open page red dot on the page you would like to submit to workflow.

2. Select "Actions" from the page menu.

3. From the Page Actions dialog window, select "Submit to Workflow."

Withdraw Pages from Workflow

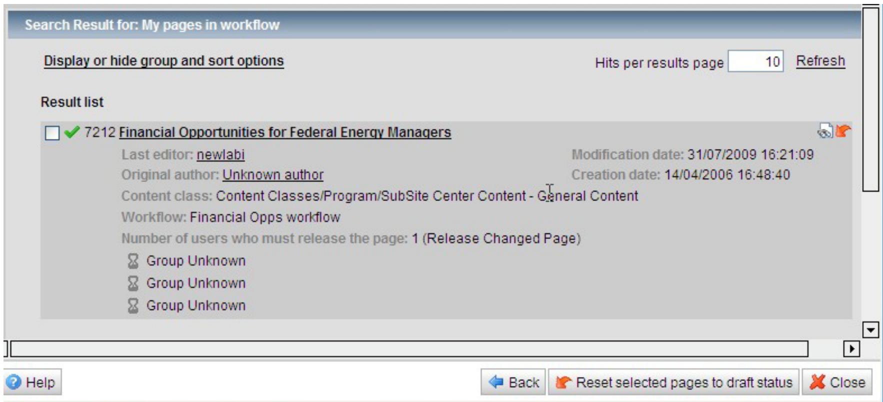
You can withdraw a page from workflow as long as it is still waiting for approval. You may want to do this if the page needs further changes, or if you want to publish the page to the staging server for a review (you can resubmit it to workflow when it is ready to go live).

Follow these steps to withdraw your page from workflow:

1. Select Tasks from the editing menu.

2. From the Select Tasks dialog window, select "X Edit Pages" under the "My Pages in Workflow" section:

3. From the My Pages in Workflow dialog window, select Reset Page to Draft Status (to the right of the page you want to withdraw):



This will move the page back into your workspace. The page will now reappear under "Pages Saved as Draft" on the main Tasks menu.

Review, Approve, and Publish Pages in Workflow

When a new or revised page has been submitted to workflow, OpenText notifies QAers that a page is waiting for their review. Depending on your preference, notification can occur via email or simply as a new task entry under "Pages Waiting for Release" on your Homepage and Tasks menus.

There are multiple ways to review, approve, and publish a page; below you'll find information on two of the most common methods.

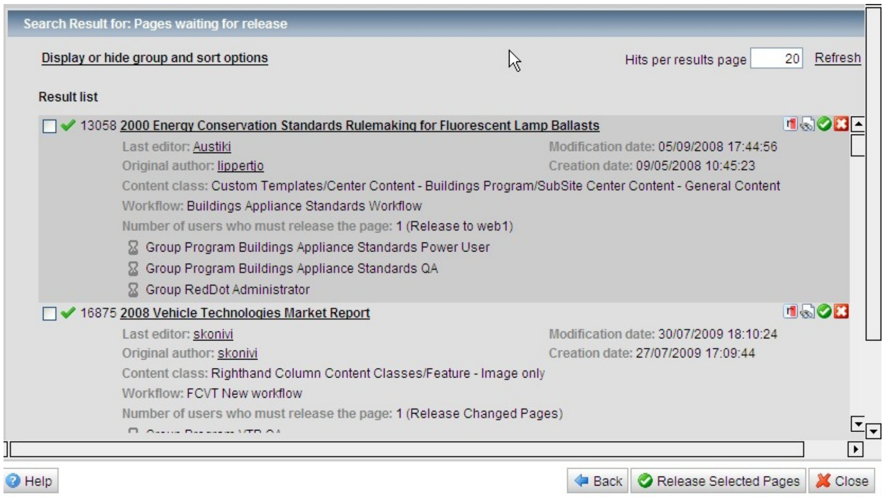
Review Pages using the Tasks Menu

Use this method if you are reviewing more than one page, if you have multiple workflow tasks to perform, or if you want to compare page versions.

1. Select Tasks from the editing menu.

2. From the Select Tasks dialog window, select "X Edit Pages" under the "Pages Waiting for Release" section:

3. On the Pages Waiting for Release dialog, you will see a list of the pages waiting for your approval (once you review and approve them, they will move on to the next stage in workflow, which is generally publication):



To assist you in reviewing and publishing the page, you can use this dialog to:

- **Preview the page.** This shows you the page as it will look on the production server.
- **Compare versions.** Previewing the page in redlining mode allows you to compare the version currently published with the version that was edited. Content that was removed is shown in ~~red strikethrough~~. Content that was added is shown in green highlight. This feature is only available for changed pages, not for new ones.
- **Make changes to the page.** Select the linked page headline to go to the page, where you can use the red dots to make any necessary changes. If you make changes, you will need to resubmit the page to workflow, and then release it to the production server (you should also republish the page to the staging server before going live, so the servers remain identical). ***Note:*** Since you are now considered the page's last editor, you will receive an email once the page has been published, instead of the person who originally submitted the page.
- **Approve and publish the page.** If the page is acceptable, select this button to approve the page; upon approval from a QAer, the page is automatically published to the production server (it is not republished to the staging server). ***Note to QAers:*** If there are new PDFs or images associated with the page, you'll need to QA the assets and move them to the production server BEFORE releasing the page to the production server.
- **Reject the page.** If the page needs additional changes that you don't want to make yourself, you can reject the page. When you do this, OpenText will prompt you to add a note to the editor explaining the reason for the rejection, and an email may be sent to the editor requesting additional changes (depending on how workflow is configured). The editor will need to resubmit the page once appropriate changes have been made.

Review a Page Using the Page Menu

Use the page menu to review the page if you are only reviewing a single page.

1. Select the open page red dot on the page you would like to review.

2. Select "Actions" from the page menu.

3. From the Page Actions dialog window, select one of the following:
   - 

     "Release Page" moves the page into the next stage of workflow (generally either into QA or up to the production server).
   - 

     "Reject Page" sends the page back to the editor requesting further changes (see above for details on rejecting pages).

   Note about "Publish Page:" In general, workflow is set up so that the "Release Page" function will release a page from workflow and automatically send it up to the production server. "Publish Page" can be used to publish part or all of your site to the staging and/or the production server; it is also used to propagate changes that cannot be submitted through workflow up to the production server. Learn more about these additional publishing options.

4. You also have the option to edit the page yourself using the red dots. If you make changes, you will need to resubmit the page to workflow, and then release it to the production server (you should also republish the page to the staging server before going live, so the servers remain identical). Since you are now considered the page's last editor, you will receive an email once the page has been published, instead of the person who originally submitted the page.

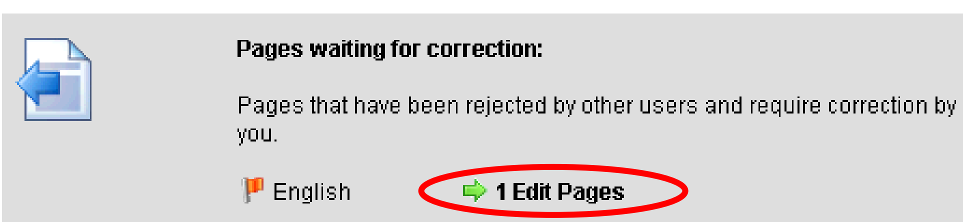
Correct Rejected Pages

Sometimes a QAer might reject a page an editor has submitted to workflow for approval. Rejected pages will be sent back to the editor requesting additional changes.

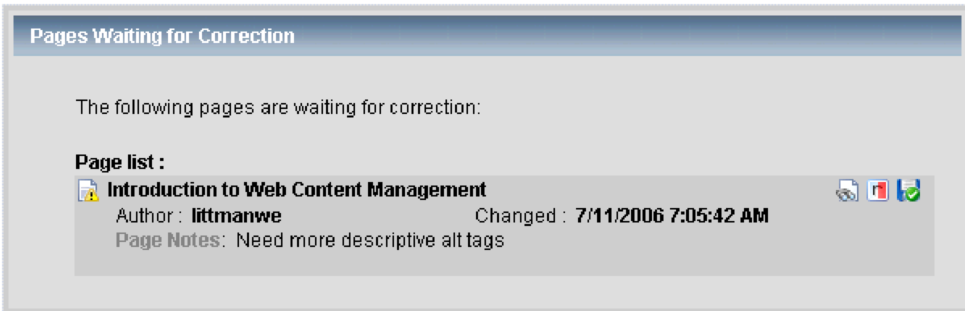
Here are the steps you'll need to take to correct the page and get it published:

1. Select Tasks from the editing menu.

2. From the Select Tasks dialog window, select "X Edit Pages" under the "Pages Waiting for Correction" section:



3. On the Pages Waiting for Correction dialog, you will see a list of the pages that need additional editing. If the QAer has included a note explaining the reason the page was returned to you, that text will also appear here (you can also access the note from the page needing correction; select "Notes" from the page menu once you open the page for editing):



4. Select the linked headline of the page you want to edit. From there, use the red dots to make any changes your QAer requested. After you make changes, the page will appear under "Pages Saved as Draft" on your Tasks menu. You must make changes before resubmitting the page to workflow.

5. Resubmit the page to workflow. If you don't see your changes on the staging server after you resubmit the page to workflow, ask your QAer to republish the page to the staging server (this is necessary so that the staging and production servers remain identical).

Reset Page to a Previously Published Version

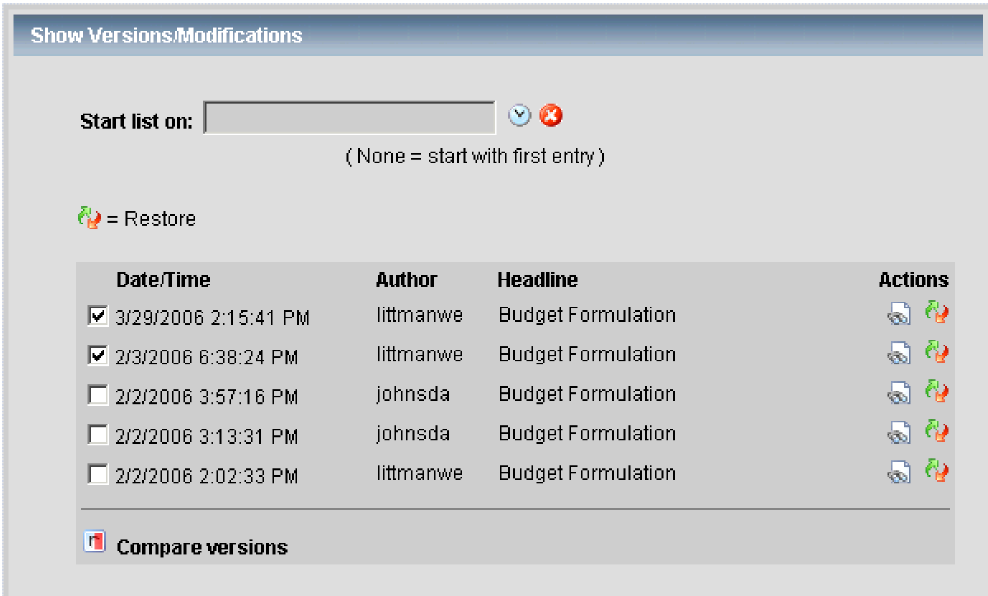
Occasionally you may need to undo changes that have already been sent to the production server. OpenText keeps a record of previously published versions of every page; you simply need to choose the version you want published and reset the page using these steps:

1. Select the open page red dot of the page you want to reset.

2. Select "Actions" from the page menu.

3. From the Page Actions dialog window, select "Show Versions."

4. From the Show Versions/Modifications dialog window, check the version of the page that you want to send live, and select Restore (to the right of the page listing). To help you choose the proper version, you can select to view the page, or you can check two versions and select **Compare versions** to compare them:



5. Once you have selected the version you want, your QAer will need to release the page in order to publish it to the production server (you should also check to be sure the correct page is now on the staging server; if it's not, ask your QAer to publish the page to the staging server as well, so the servers remain identical). Note that your newest version will still be available, should you ever want to go back to it.

Additional Publishing Options

There are times when the QAer may need to send all or part of a site live, publish files to the staging server only (for a review), or propagate changes that cannot be submitted through workflow up to the production server. (Changes that cannot be submitted through workflow include file name changes; left navigation graphics changes; deleted pages; features connected to multiple pages; and, for those sites using OpenText's asset manager, asset replacement – basically, any time that a change is made, and no subsequent task appears in the task bar.) In these cases, QAers need to run publishing jobs that are outside of the normal workflow system.

Publish a Single Page to Production

Use this option to send a file name change to the production server. For those sites using the OpenText asset manager, this method is also used to send replacement assets to the server (see Appendix A for more information on using the asset manager).

1. Select the open page red dot on the page you would like to publish.

2. Select “Actions” from the page menu.

3. From the Page Actions dialog window, select “Publish Page.”

4. From the Publish dialog window, check the “HTML,” “Mobile,” and “Print” boxes – this will publish the page you are on (check the “HTML_forQA,” “Mobile_ForQA,” and “Print_forQA” as well if you also wish to publish the page to the staging server). If you are changing the file name of the page, select “Publish related pages,” and any pages that are related to that page will also publish to the production server. Select “OK.”

Publish an Entire Site to Production

Use this option to clean deleted pages off the production server, ensure that changes to left navigation graphics propagate to all affected pages, send features connected to multiple pages live, etc.:

1. Select the open page red dot on the site’s home page.

2. Select “Actions” from the page menu.

3. From the Page Actions dialog window, select “Publish Page.”

4. From the Publish dialog window, select “Publish all following pages,” then check the “HTML,” “Mobile,” and “Print” boxes (this will publish to the production server; check the “HTML_forQA,” “Mobile_forQA,” and “Print_forQA” as well if you also wish to publish the page to the staging server). Select “OK.”

Publish to Staging Server Only

At times, you may need your supervisor or client to review a page (or an entire site) before it goes live. In most cases, the page editor needs only to submit the page to workflow; this will automatically publish the page to the staging server (http://www2.eere.energy.gov/xxx/). The editor can then withdraw the page from workflow so the QAer won’t accidentally publish it while the review is taking place, and then resubmit it when the page is ready to go live.

Sometimes a QAer will make changes to a submitted page. If so, the QAer should republish the page to the staging server so the servers remain identical. To republish:

1. Resubmit the page to workflow.

2. Navigate to the page you want to republish to the staging server.

3. Select the open page red dot on the page you would like to publish.

4. Select “Actions” from the page menu.

5. From the Page Actions dialog window, select “Publish Page.”

6. From the Publish dialog window, check the “HTML_forQA,” “Mobile_ForQA,” and “Print_forQA” boxes ONLY. If you are changing the file name of the page, select “Publish related pages” – this will publish the page you are on, plus any pages that are related to that page, to the staging server. Select “OK.”

7. Follow the instructions for publishing pages when you are ready to send the page to the production server.

Publish a Thank-You Page for a Form

When you need to publish a Thank-You page for a form, such as webmaster contact form, note that you must navigate to the page in the CMS and release it separately through the Actions menu. A Thank-You page is not associated with another page as a parent page, so it cannot be captured with the “Publish all following pages” option from a parent page.

If you are working on a form page, contact your EES representative to have the Thank-You page set up in the CMS, as some special stipulations apply to it.

Publish an Edit to the Live Server While Retaining Changes on Staging

Occasionally you may have a page edit that you need to move to the live server while leaving other page edits on the staging server, perhaps because the initial changes are still waiting for approvals. Contact your developer or your EES representative if you need help with this. Depending on the nature of the change, the page code can sometimes be altered in the HTML page file then re-uploaded to the www1 directory. There is another option for this, however; developers can see the steps to send page edits live while retaining an alternate version on the staging server.

••• Information for Developers and QAers •••

Developers and QAers have additional permissions so they can help editors accomplish more complicated tasks and keep the site up to EERE Web standards. Use the information in this section to learn how to change file names, upload assets, add left navigation graphics, edit the source code, and check links.

Upload PDFs, Images, and Other Assets to the Server

Assets such as images and PDFs (as well as other attachments) are stored directly on the staging and production servers. Developers and QAers can upload new or replacement assets to the servers using the Asset Transfer System (ATS) (editors can link to the images or attachments once they have been uploaded).

Note: A few sites store assets in OpenText's asset manager instead of directly on the server; if your site is one of them, learn more about uploading assets to the asset manager.

Upload New or Revised Assets

Step 1: Upload Assets to the Staging Server (Developer or QAer)

1. Unless it is a replacement asset, make sure the asset you plan to upload has a unique file name (if there is a file on your site with the same name as the one you upload, the ATS will overwrite the older file with no warning). To do this, type (for example) "link:biomass_feedstocks.pdf" (minus quotes) into the search box on http://www.eere.energy.gov/.

2. Upload the asset to the proper directory in the WebAssetsToStaging folder (ftp://eeftp.ee.doe.gov/WebAssetsToStaging/; ID and password can be obtained from your EES representative. Left navigation images should be placed in the /leftnavimages folder within your program or office directory. The asset will automatically be transferred within a few minutes to the staging server (http://www2.eere.energy.gov/xxx/).

3. If an editor is editing the associated OpenText page, email the site-relative link to the asset back to the editor so they can connect the asset using the text editor.

Step 2: Link to Asset (Editor, Developer, or QAer)

1. Use the site-relative link provided by your developer to add the image or attachment to your OpenText page using the text editor. Pages linking to replacement attachments often need to be altered as well, since files generally change size when edited.

2. Submit the page to workflow.

Step 3: Transfer Asset to Production Server (QAer)

1. QA the asset to be sure it complies with EERE's PDF standards.

2. Upload the asset to the proper directory in the WebAssetsToProduction folder (ftp://eeftp.ee.doe.gov/WebAssetsToProduction/; ID and password can be obtained from your EES representative). The asset will automatically be transferred within a few minutes to the production server (http://www.eere.energy.gov/xxx/). ***Note:*** If the QAer will be uploading, linking, and going live with assets, he or she can save time by transferring assets to staging and production simultaneously (the production FTP login will give you access to both directories).

3. Release the associated OpenText page for publication to the production server. Once live, the QAer or developer should check the page and link to be sure everything is working properly.

Delete Unused Assets

As sites are maintained, graphics, PDFs, and other assets once used will no longer be needed. If you need an asset deleted, email your EES representative with the file name and path, and they will delete the file for you. Your EES representative also can provide you with a listing of assets in a particular directory for your perusal.

File Types Handled by the ATS

Below you'll find a list of the file types that the ATS is currently configured to handle. If you would like to have the ability to upload additional file types, please make your request to your EES representative.

Type of File	File Extension
Acrobat Portable Document Format	.pdf
Adobe Flash Animation	.fla
Apple QuickTime Movie	.mov
Calendar request	.ics
Compressed Archive File	.zip
Excel Worksheet	.xls, .xlsx
Extensible Markup Language File	.xml
Flash Video File	.flv, .f4v
Image Files	.jpg .tif .png .gif .psd .eps .bmp
Macromedia Flash Format Files	.swf
MPEG Audio Stream	.mp3, .mp4
Office 2007 Theme File	.thmx
Plain Text File	.txt
PowerPoint Presentation	.ppt, .pptx, .pot, .potx
Rich Text Format File	.rtf
Stuffit Archive	.sit
Windows Media Video File	.wmv
Word Document	.doc, .docx

Word Processor Document	.wpd

Add or Change a Left Navigation Graphic

If an editor creates a new page, and then connects it to the left navigation, a placeholder will appear in the left navigation in place of an image. This also occurs when a page headline is changed, because the page headline is tied to the left navigation image names.

In either case, developers need to upload new left navigation images to the server using this process:

1. Create "on" and "off" graphics (for new OpenText pages or for existing graphics you wish to alter). Once created, developers should submit the graphics to the Web Template Coordinator for EERE Information Architecture Team approval (please allow five business days for approval).

2. Navigate to the OpenText page with the affected graphic or graphic placeholder.

3. Right-click on the image or image placeholder and select "Properties." At the top of the Properties dialog you will find the file name you should use for the "on" graphic (for the "off" graphic, simply change the last part of the file name from _on to _off). Because the navigation image names are tied to the page headline, the images must be given the file name OpenText expects to find in order to work properly.

4. Follow the instructions for uploading your images to the server.

5. Ask your QAer to republish the whole site after the associated OpenText page has been released to ensure that changes to the left navigation graphics propagate to all affected pages.

Redirect a Left Navigation Button

OpenText offers the ability to set a left navigation button so that, when selected, it automatically forwards to a page in a different section of your site. Buttons can also be set to forward to another EERE site; for example, from a subsite back to the program's corporate site.

Use the steps below to redirect a left navigation button:

1. Select the left navigation button that you would like to redirect. ***Note:*** If this is for a new left navigation button, you'll first need to follow the instructions for creating and connecting a page in the left navigation. Please see the steps below for information on adding the appropriate page headline and file name to your new page.

2. Select the open page red dot .

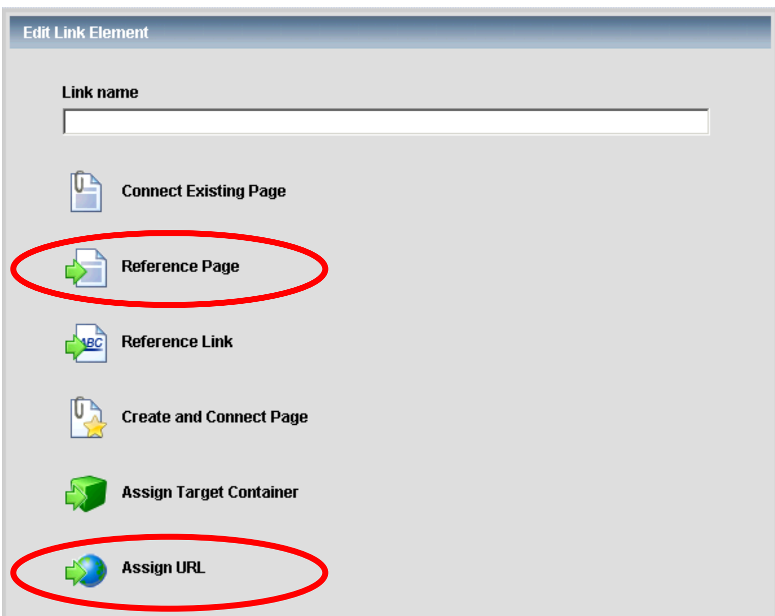
3. Select [edit headline]. On the Edit Element 'hdl_headline' dialog, add the word "Redirect" to the page headline (if this action "breaks" the left navigation button, you'll need to rename the left navigation graphic).

4. Select "Properties" from the page menu at the top of the page. On the Edit Properties dialog, add "_redirect.html" to the end of the existing file name. This, along with the change to the page headline, helps identify the page as a redirect placeholder page to users conducting searches.

5. Select [edit content]. When the text editor opens, remove all the content from the page (or simply leave the page blank, if it is a newly created page).

6. Scroll to the bottom of the page and select [edit forwarding page].

7. From the Edit Link Element dialog window, select "Reference Page" to redirect to another page within your site (then search for the headline of the page you want to redirect to in the resulting search dialog window). Or select "Assign URL" to redirect to a page outside of your site (then paste in the URL of the page you want to redirect to on the Assign URL dialog window):



8. To verify that the redirect you've now put in place is working, select "Actions" from the page menu at the top of the page. From the Page Actions dialog window, select "Page Preview." The preview box should open with the content of the page to which you redirected.

9. Submit the page to workflow for publishing.

Remove a Redirect

1. Select the left navigation button from which you'd like to remove a redirect.

2. Select the open page red dot.

3. Scroll to the bottom of the page and select [edit forwarding page].

4. From the Edit Link Element dialog window, select "Delete Reference" to remove the redirect. OpenText will ask you to verify that you definitely want to remove the reference (select "Yes").

5. Remove the word "redirect" from the page headline and the file name (see above for instructions on altering the headline and file name).

6. To verify that the redirect has been removed, select "Actions" from the page menu at the top of the page. From the Page Actions dialog window, select "Page Preview."

7. Submit the page to workflow for publishing.

Override a Left Navigation Button

Sometimes more than one navigation button will display the same text but appear in different levels of the site. In that case, you can implement an override of the navigation button.

Follow the first three steps for redirecting a left navigation button, but at the headline field of the Edit Properties dialog, type in NAVOVERRIDE2 right after the headline text, without a space between. This will change the file name of the left navigation button's image. For example, if there are two "Contacts" navigation buttons on different levels of a site, the file name of one of the images will be renamed to "ln2_contacts_on.gif" rather than "ln_contacts_on.gif."

Add a Custom Style Sheet

While all of the EERE sites use a standard style sheet, you may encounter the need to define additional styles for a particular site. You can do this by adding a custom style sheet for your site.

Please note that custom style sheets should only be used to define special styles that are not already available in the standard EERE style sheet, and they should not be used to overwrite the standard EERE styles such as font type, size, and headers, for example.

Please contact your EES representative should you need to add or edit a custom style sheet for your site, and an OpenText administrator can complete the work for you.

Edit Source Code

At times, developers may need to add complex scripts, forms, tables, or other elements to the site. The code for elements like these, which are beyond the scope of OpenText's editing tools, can be created in another application and then pasted directly into the page's source code using the text editor.

Note: Adding javascript and multimedia files (video, audio, animations) requires the help of an OpenText administrator. Contact your EES representative if you need to add these elements to a page.

Here are the steps you can follow to edit a page's source code:

1. Select the open page red dot .
2. Select the edit red dot for the main body of content to open the text editor.
3. At the bottom left of the text editor window, select HTML .
4. To save your work, select "Save," or "OK" to save your work and exit out of the text editor ("Ctrl+S" and the Enter key do not work for this function).

Send Page Edits Live While a Separate Version is Retained on the Staging Server

Occasionally you may have a page edit that you need to move to the live server while leaving other page edits on the staging server because they are still waiting for approval, etc. Contact your developer or your EES representative if you need help with this. Depending on the nature of the change (for instance, if it's a very minor change), the page code may be altered in the HTML page file then re-uploaded to the www1 directory. An EES technician can do this for you.

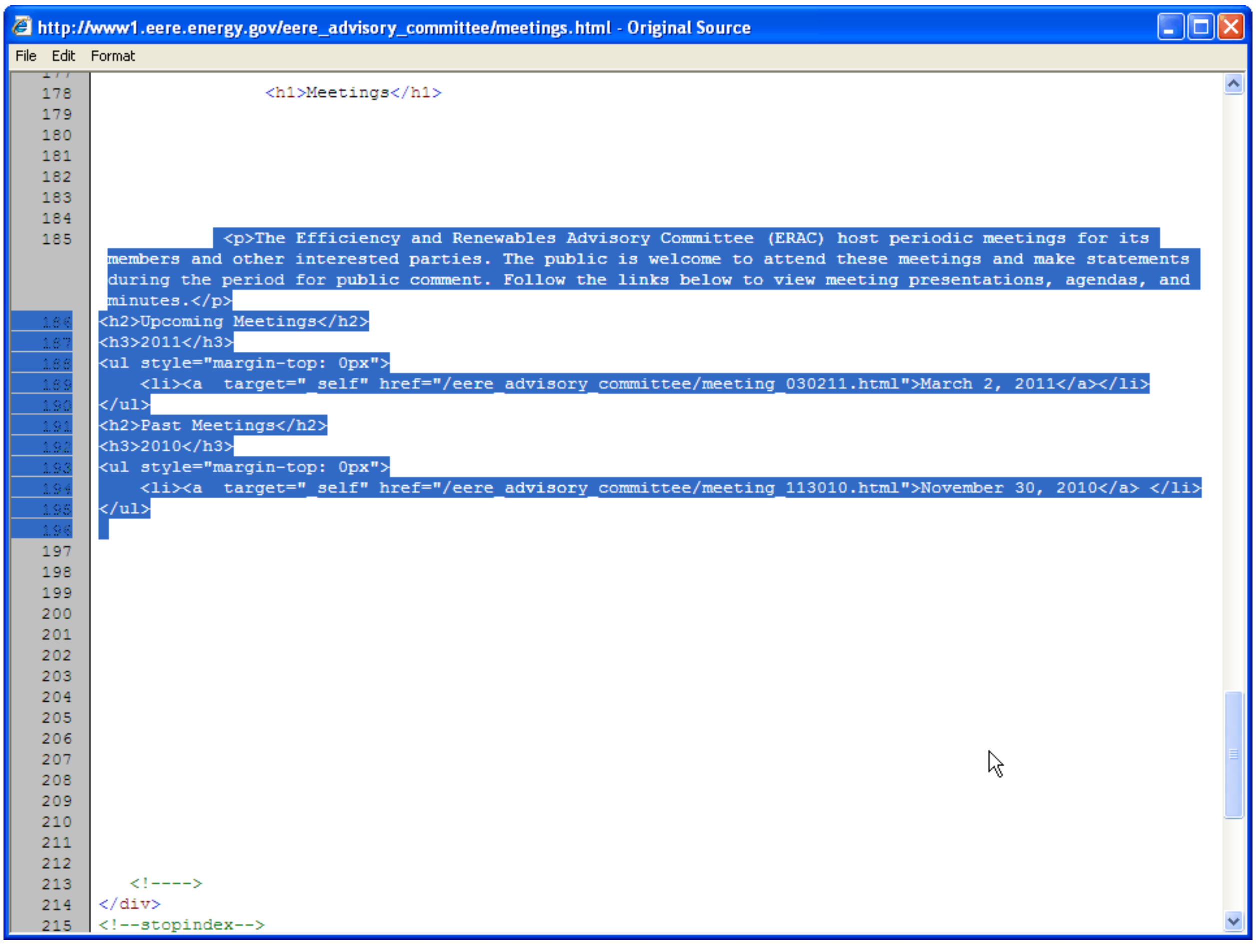
There is another option, however, for developers who want to speed through a change to the live server while keeping an alternate version on staging:

1. On the page, select the open page red dot , then the edit red dot for the main body of content to open the text editor.
2. At the bottom left of the text editor window, select HTML .
3. Select all of the code with "Ctrl+A," then copy it with "Ctrl+C," leaving this text editor window open.
4. Open up a blank document in the Notepad or Wordpad program and paste the code into the document with "Ctrl-V." Save the document in a place where you can easily access it later.

5. Navigate to the page on the live server in your standard browser window.

6. Call up the page's source code. In Internet Explorer, choose the Page menu in the top right, then choose "View Source." In Firefox, go to the View menu in the top left and choose "Page Source."

7. In the source code window, carefully navigate to the code for the center content of the page, found near the bottom, past the template code. Select *only* that code, from the point below the <h1> tags, all the way down to almost the <!--stopindex--> tag and the footer information. Copy only until the last closing </p>, </div>, etc. tags. Copy the code with "Ctrl+C."



8. Return to your open text editor window in OpenText and paste the code into the window, making sure the window is still on the HTML view.

9. Make the edit(s) needed for the live server version of the page.

10. Save your work, selecting "Save," or "OK" to save your work and exit out of the text editor.

11. Submit the page to workflow, for instance by selecting “Submit to Workflow” from the Actions menu.

12. Check the page on www2 to make sure the content flows OK and your change is incorporated.

13. Return to the page in the CMS and choose “Release Page” from the Actions menu.

14. Once the page has been released to the live server, with your change(s) implemented, return to the page in the CMS and call up the text editor window again.

15. Call up the code you saved in Notepad or Wordpad, select it and copy it, then paste it into the HTML view in the text editing window.

16. Submit the page to workflow again, where it can remain until your further changes are ready to go live.

Check Links

Although OpenText does some link management for you, developers will still need to perform regularly scheduled link checks to find and fix some broken links.

Links to Pages Within Your Website

Links to other pages within your program, program subsite, or office site should be established using the OpenText URL (learn more about establishing links to pages within your site using the text editor).

When you have linked to a page using the OpenText URL, and that page is then deleted, OpenText will remove all links from other OpenText pages to the deleted page (although the linked text must be removed manually). Therefore, you should not find broken links to other pages linked using OpenText URLs.

Links to Pages on Other Websites

Links to non-EERE sites, or to EERE sites other than the one you are currently editing should include the full URL path (e.g., http://www.eere.energy.gov/biomass/information_resources.html). Therefore, when pages that you’ve linked to on other sites are deleted, you will have a broken link on your site.

We recommend running link-scanning software on your site once a month; this will allow you to catch and fix any broken links that you find. There are several software packages available (some free) that will perform a link check for you. Contact your EES representative if you need suggestions on link-checking packages.

Add Flash or Video Content to a Page

Follow these steps when you need to add Flash content to a page. (For adding video to a page, first review the guidelines for adding video content, as there are special requirements regarding formatting and where video files are stored.)

1. Upload your .swf file to the correct directory in the ATS. This is usually the media folder in the program directory. Example: /education/media/eduhome_rotator.swf

2. Log in to the CMS and navigate to the page.

3. Select the open page red dot.

4. Scroll down to the bottom of the page and click on [page contains Flash content? yes/no].

5. In the dialog box that comes up, select "Yes" from the dropdown menu and click OK.

6. Select the edit red dot to access the center content of the page.

7. In the text editor, switch to HTML view and find the spot where you'd like to insert the Flash object.

8. Copy and paste the code for the type of Flash you are implementing.

   For a Flash rotator, copy and paste this exact code:

```
<!--embeding Flash object -->
<div>
        <script type="text/javascript">
                var ObjFlashID = {
                swf_id: 'FlashID',
                swf_fileName : '/education/media/eduhome_rotator.swf',
                swf_width : '530',
                swf_height : '220'
        };
        </script>
<script type="text/javascript">
        document.write('<' + 'object id="' + ObjFlashID.swf_id + '"
classid="clsid:D27CDB6E-AE6D-11cf-96B8-444553540000" width="' + ObjFlashID.swf_width +
'" height="' + ObjFlashID.swf_height + '">');
        document.write('<param name="movie" value="' + ObjFlashID.swf_fileName + '">');
</script>
<param name="quality" value="high" />
<param name="wmode" value="transparent" />
<param name="swfversion" value="7.0.70.0" />
<param name="expressinstall" value="/includes/expressInstall.swf" /><!--#include
virtual="/includes/flashinclude.asp" -->
        <div class="hide">
                <p>[Non-Flash Accessible Text]</p>
        </div>
</div>
<!-- end embed Flash object-->
```

For a Flash video player, copy and paste this exact code:

```
<!--embeding Movie object -->
<div style="margin: 20px auto; width: 500px">
<div style="margin: 20px auto; width: 500px" id="mediaspace">Loading....</div>
<script type=text/javascript>
var so = new
SWFObject('/multimedia/media/includes/eere_player.swf','mpl','500','390','9');
so.addParam('allowfullscreen','true');
so.addParam('allowscriptaccess','always');
so.addParam('wmode','opaque');
so.addVariable('image','/wip/media/nwtp_promo.jpg');
so.addVariable('file','/multimedia/media/nwtp_promo.flv');
so.addVariable('volume','90');
so.addVariable('stretching','fill');
so.addVariable("abouttext","EERE");
so.addVariable("aboutlink","http://www.eere.energy.gov/");
so.write('mediaspace'); </script>
<noscript>
<p>Video discussing the national weatherization training platform.</p>
</noscript></div>
<!--end embeding Movie object -->
```

9. Replace the red text with the specific details of your Flash element. You can style the outer div to float things to the right/left or center the Flash object. Multiple Flash objects can be placed on the page by copying, pasting, and updating these scripts for each. Be sure to edit the ID property for each Flash file, and give each object a unique identifier (“swf_id” for a rotator; “id=” for video player). The ID is not displayed on the published page, and it must contain only numbers and/or letters, without spaces.

10. Click OK to close the editing window. The Flash object should then be shown on the SmartEdit window and preview mode. (Flash objects do not show up in the Telerik editing window.

●●● More Information ●●●

This section provides answers to frequently asked questions as well as information on how you can attend an OpenText training or get more information.

Frequently Asked Questions

Below you'll find some frequently asked questions about how to use OpenText's content editing tools. If you don't find the information you need here, you can contact your EES representative.

When I log in, I am on the Homepage; how do I get from here to the page I want to edit? If the page you want to edit is already listed under "Saved as Draft" on the Homepage summary of the editing-to-publication process, you can simply select the linked headline of your page and OpenText will take you to that page. If you want to edit a page that is not listed on the Homepage summary, select Web Content Manager (left navigation) to toggle to the editing menu, then use the links to navigate to your page (as you would navigate through the live site).

My Homepage screen is blank; why? If it is the first time you've ever logged onto OpenText, you'll need to first select a project before information about that project can be displayed on your Homepage screen. Once you have selected a project, select Web Content Manager (left navigation) to toggle to the editing menu, where you can navigate to the page you want to edit.

I want to change the file name for one of my pages; is that a good idea? Because the file name becomes part of a page's URL, it is generally not a good idea to change an established file name, because the change will break any links others have established to your page. However, if you need to change a file name, see the instructions for adding a file name. Your developer or the EERE Search Specialist can also help you take appropriate measures, such as adding a bookmark update or obtaining a list of other pages that link to your page, before changing the name.

I want to add a new top navigation button; how do I do that? Top navigation buttons will need to be added by an OpenText administrator, and they require approval from the EERE Information Architecture Team (the Web Template Coordinator can handle the approval for you). Once developers have information architecture approval, contact your EES representative to get a new button created and added to your site.

How do I keep captions and information in text boxes out of my search result summaries? The EERE search engine uses the first 200 characters of text for the summary in search results. If a photo caption or words in a text box are the first text on the page, ask your developer to put stopindex tags around them to keep that information from showing up in search engine summaries. If you've installed stopindex tags and are still not satisfied with the search summary, look at the introductory text on the page. Make sure it describes the page content and contains key words or phrases that will help the page ranking in search results.

The content on one of my pages is totally different from what it used to be – and it's identical to the content on a new page that was just sent live. What's going on? You may have accidentally given the new page the same file name (e.g., "new_page.html") as one of your site's existing pages. When this happens, OpenText automatically overwrites the content on both pages with the content of the new page. Assign a new file name to the new page; this will restore the original content to the existing page.

Since there is currently no automated way for OpenText to detect if a page name has already been used on the site, you will need to conduct a search from the main EERE home page before naming a new page. This will show you if the new file name is already in use (for example, type url:/femp/financing/uescs_fupwgmeetings.html into the search box, and if you get a search result, the file name is already in use; if you get no results, it's not).

I just changed my page headline and now the left navigation images aren't working; what happened?
The page headline is tied to the left navigation image names. So if the page headline is altered, the left navigation images will need to be renamed and uploaded to the server by your developer. Learn more about adding or changing left navigation graphics.

When in OpenText, I clicked on a link from an old page to a newly created page I'd been asked to QA, and the new page was blank – why would this be?
As a QAer (and not the new page's latest editor), you will only be able to see the new page if you access it using the Homepage or the Task bar. If you want to test a link that the editor has established from an existing page to the new page, go to the existing page on the staging server (www2.eere.energy.gov/xx/) and test the link from there – everything should work properly, since the existing page and the new page are published to the staging server automatically when the editor submits them to workflow for your review.

I generally access pages I need to QA using the Homepage instead of Tasks, because everything is on one page and I don't need to click through several screens. However, I have noticed that I don't always see every page that I have submitted to workflow here (although they do show up on the Tasks menu) – what is going on?
Since there are space limitations, you may not see every page that is actually in your workflow on the Homepage at once. However, the numbers to the right of each section header 10 of 11 tell you how many tasks there are under each header, and how many you are currently viewing (in this case, for example, "10 of 11"). If you want to see every item on a particular list, simply select the list heading to display all of the items on that particular list. To view your complete Homepage again, select another left navigation button, and then reselect "Homepage." In addition, you can open and close each list by selecting the green arrow to the left of the section header.

My supervisor/client would like to review my new page before it goes live; is this possible?
Yes; your client or supervisor could review your page on the staging server, which is not accessible to the general public. Learn how you can publish your page to the staging server.

Attend an OpenText Training

OpenText trainings are offered as the need arises via a live, Web-based demonstration.

We will work with you to schedule training for everyone involved with editing and maintaining your site before it goes live in the OpenText system.

If you would like to schedule an additional training, or if you'd like to attend a scheduled training, please contact your EES representative:

Federal Energy Management, TEAM, Weatherization and Intergovernmental, Wind and Water:
Glenda Garcia, 301-903-8693, Glenda.Garcia@hq.doe.gov

EERE Corporate, Business Administration / Planning, Budget, and Analysis, Commercialization and Deployment, Efficiency and Renewables Advisory Committee, Energy Education and Workforce Development, Field Operations:
Billie Newland, 301-903-8595, Billie.Newland@hq.doe.gov

Biomass, Buildings, Industry:
Stacia Parfionov, 301-903-8816, Stacia.Parfionov@hq.doe.gov

Geothermal:
John Shortess, 301-903-8798, John.Shortess@hq.doe.gov

Hydrogen and Fuel Cells, International Activities, Solar, Vehicles:
Lawrence Wiggins, 301-903-8793, Lawrence.Wiggins@hq.doe.gov

For Further Information

If you have a question about how to use OpenText, or you need assistance from an OpenText administrator, you can contact your EES representative (see the contact list above).

Or check out our Frequently Asked Questions, which may provide the answer you're looking for.

●●● Appendix A: Using the Asset Manager ●●●

This section provides information on uploading, removing, and linking to PDFs, images, and other assets for sites whose assets are stored in OpenText's asset manager.

Sites that Use the Asset Manager

PDFs, images, and other site assets are stored directly on the server for most EERE sites (access to assets is provided using the Asset Transfer System). However, a few sites use OpenText's asset manager instead to store and manage assets.

The process for uploading and linking to assets is different for sites using the asset manager. Here is a list of the sites that use the asset manager, and the name of each asset manager:

Name of Website	Name of Asset Manager
About the Office of EERE	Offices_AboutEERE
BestPractices	Programs_ITP_TechnologyDelivery
Biomass Program	Programs_Biomass
Biomass Project Fact Sheets	Programs_Biomass_Pdfs_Factsheets
27th Symposium on Biotechnology for Fuels and Chemicals	Programs_Biotech_Symposium
EERE Communication Standards and Guidelines	Corporate_CommStandards
Content Management System	Corporate_CommStandards_CMSHelp
Guidelines and Tips for Exhibits	Corporate_CommStandards_Exhibit
Print Standards and Guidelines	Corporate_CommStandards_Print
Standards and Guidelines for Websites	Corporate_CommStandards_Web
Wind and Hydropower Technologies Program	Programs_WindHydro

Upload Assets to the Asset Manager

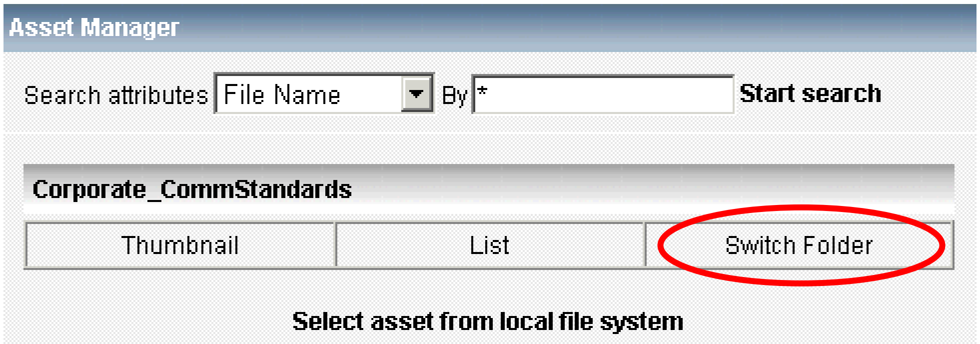
Developers and QAers can upload new or replacement images, PDFs, and other assets to the asset manager so editors can add them to their pages.

Use the information here to learn how to upload files from your local system, update existing files, and delete files that are no longer necessary:

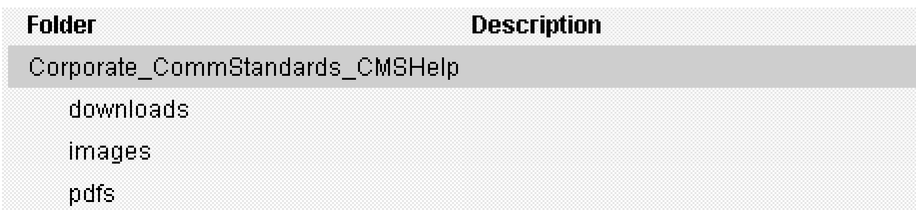
Upload Files from Your Local System

1. Select Asset Manager from the general menu.

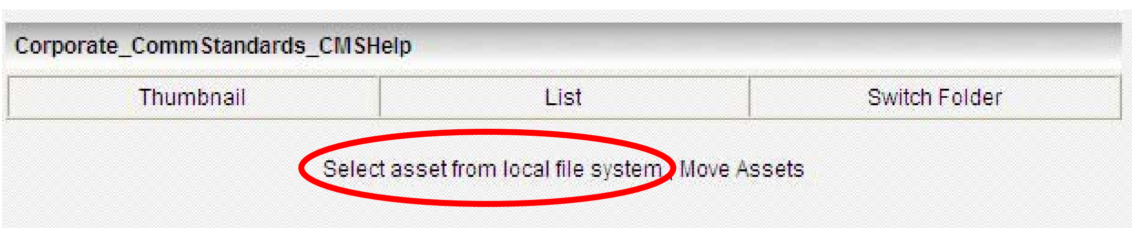
2. Select “Switch Folder:”



3. Below the listing for your asset manager, choose the directory to which you want to upload your image or attachment (***Note:*** Files cannot be moved from one directory to another in the asset manager, nor can they be renamed; so be sure to upload the file with the correct name to the correct directory.):



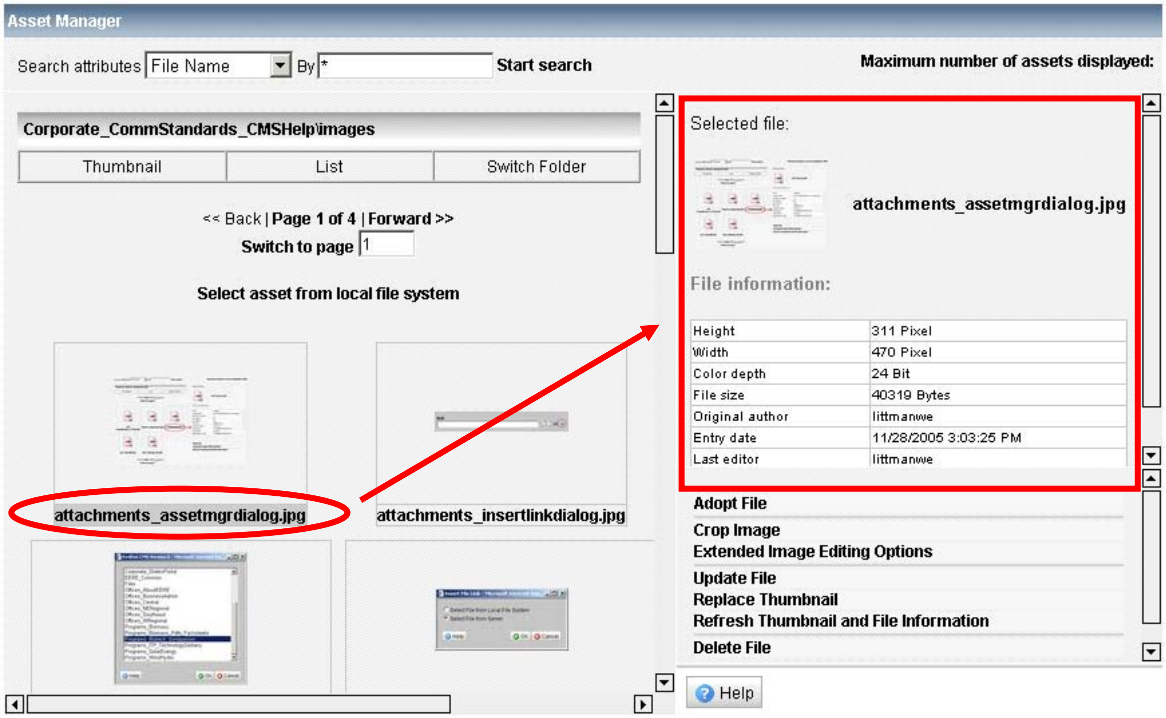
4. Choose “Select Asset from Local File System”:



5. On the Transfer Local File dialog window, select “Browse” and browse to the file on your computer (or other local file system); select it.

6. The file should now appear in your site’s asset manager. When you select the file name, information about that file should appear on the right side of the screen. If you don’t see information, select “Refresh Thumbnail and File Information” on the lower right to display the file information.

For example:



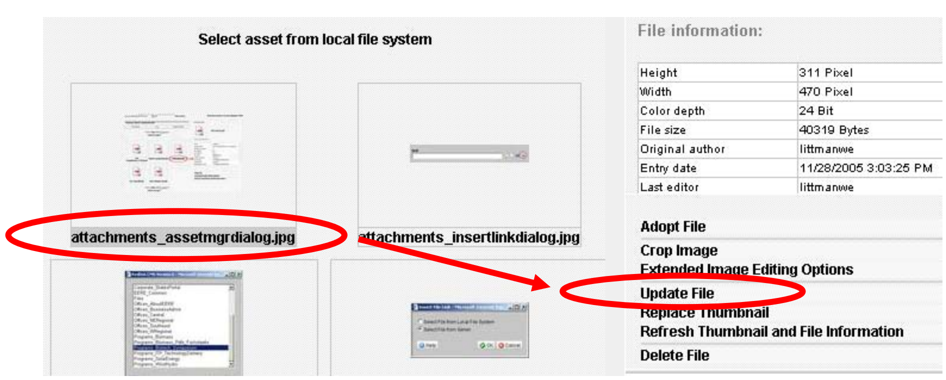
As your file list grows in size, you can view the contents of the folder as a list (select "List" from the top left), or you can search the contents by file name, original author, last editor or other attributes (search at top of the screen).

Update Existing Files

1. Select Asset Manager from the general menu.

2. Select "Switch Folder," then choose the directory below the listing for your asset manager into which you want to place your updated image or attachment (if you need a new folder, an OpenText administrator will need to set that up for you; contact your EES representative for more information).

3. Select the name of the file that you want to replace, then select "Update File":



4. On the Transfer Local File dialog window, either type in the path and file name, or select "Browse" to browse to the file on your computer (or other local file system) and select it. The file you are uploading must have the same name as the file you are replacing. Select "OK." ***Note:*** Replacing the old file in the asset manager will automatically replace the old file with the new one for every usage on the site.

5. Republish the site to production (must be completed by a QAer). This ensures that your file is sent up to the live server (simply sending the associated OpenText page through workflow will not update the file on the production server). Note that it may take several hours for the new file to replace the old file on the live server.

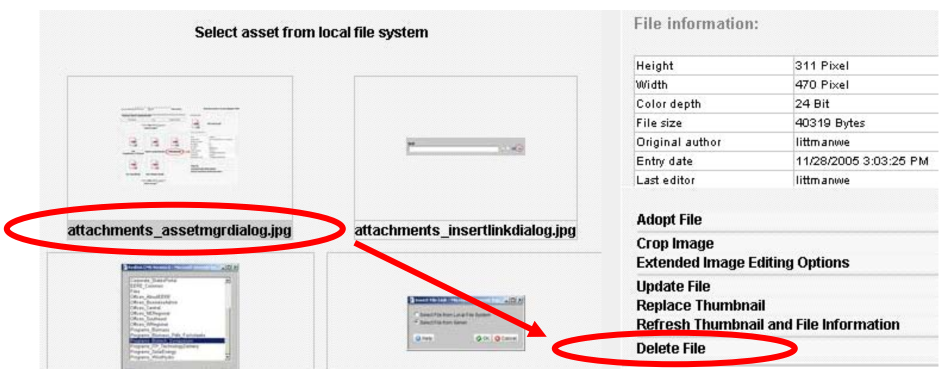
Delete Unused Files

As sites are maintained, graphics, PDFs, and other assets once used will no longer be needed. The process for deleting these files in OpenText is simple:

1. Select Asset Manager from the general menu.

2. Select "Switch Folder," then choose the directory (below the listing for your asset manager) where the files you want to delete reside.

3. Select the name of the file that you want to delete, then select "Delete File":



Add Attachments to a Page

Once a developer or QAer has uploaded a new attachment (PDF, Word document, etc.) to the appropriate asset manager, the attachment is available for editors to add to their pages using the text editor.

Use the information below to learn more about using the text editor to add or remove links to attachments:

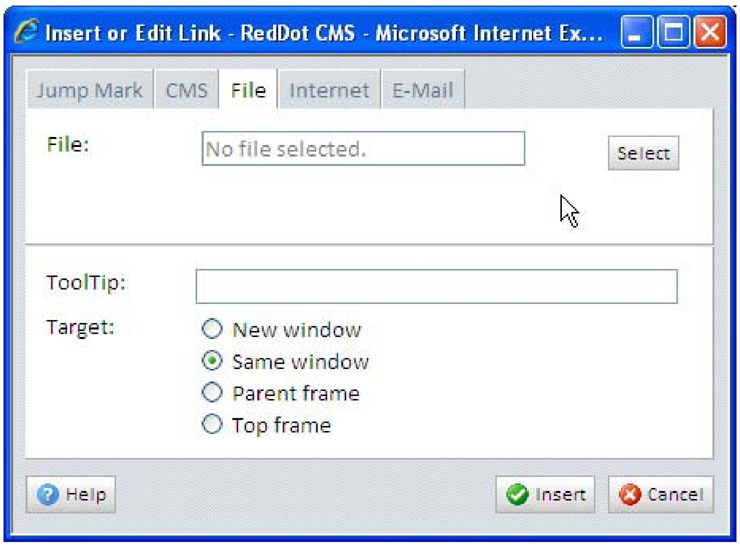
Add Links to Attachments

1. Be sure your site developer has uploaded the standards-formatted attachment to your site's asset manager.

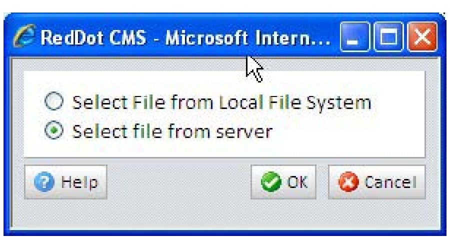
2. In the text editor, highlight the text you want to link to your attachment. Your link format needs to comply with the EERE attachment linking standards.

3. Select Link  from the toolbar.

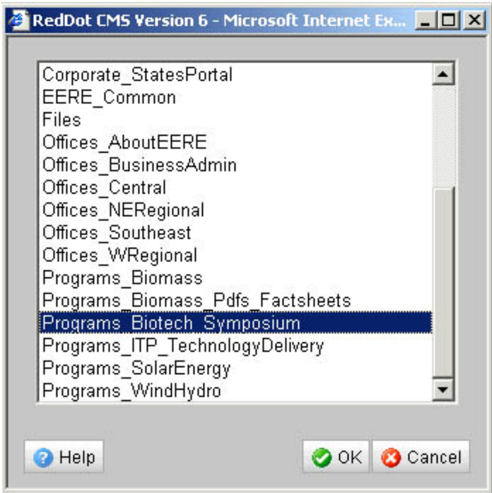
4. From the Insert or Edit Link dialog window, select the File tab and select the Select button:



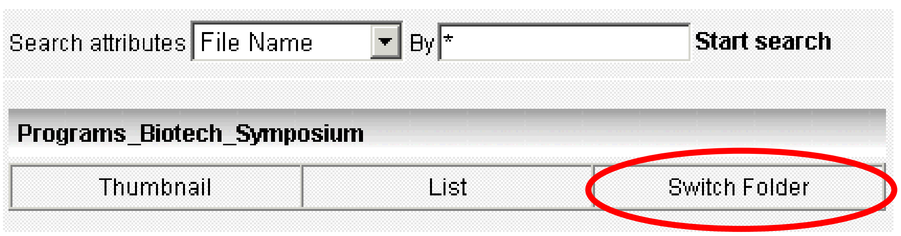
5. From the next window, choose "Select File from Server" (developers and QAers only will need to complete this step):



6. Select your site's asset manager (some sites may have multiple asset managers, for different sections of the site):



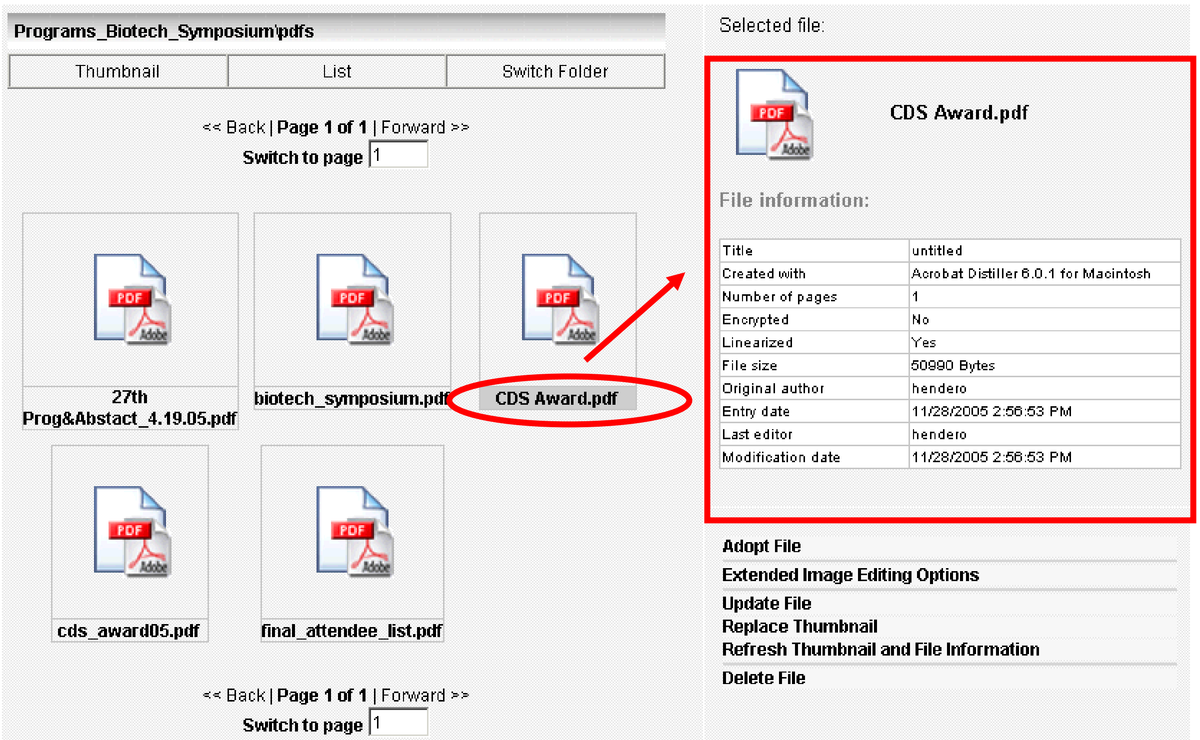
7. You are now in your site's asset manager. Select "Switch Folder":



8. Below the listing for your asset manager, choose the directory (docs, pdfs, etc.) in which your attachment resides:

9. Select the attachment you want to link to by selecting the attachment's name. You can also see a preview of the attachment by selecting the thumbnail. When you select the file name, information about that file appears on the right side of the screen (if you don't see information, select "Refresh Thumbnail and File Information" on the lower right to display the file information).

For example:



As your file list grows in size, you can view the contents of the folder as a list (select "List" from the top left), or you can search the contents by file name, original author, last editor or other attributes (search at top of the screen).

10. Select "OK" at the bottom of the asset manager screen. The OpenText URL for your attachment now shows up in the box of the Insert or Edit Link dialog.

Delete Links to Attachments

1. Highlight the text of the link you want to delete.

2. Select Delete Link  from the toolbar.

If you no longer need the attachment you unlinked, ask your developer to remove the attachment from the asset manager.

Add Images to a Page

Once a developer or QAer has uploaded a new image to the appropriate asset manager, the image is available for editors to add to their pages.

There are multiple ways to add images to your page. If you want to add images in unique locations on each page, you'll need to add them using the text editor. (***Note:*** If you have images that appear in the same place on every page, an OpenText administrator can develop a special page template for you to streamline the process for adding images to your pages; contact your EES representative for more information.)

Use the information below to learn more about adding, positioning, and deleting images using the text editor:

Add and Position Image

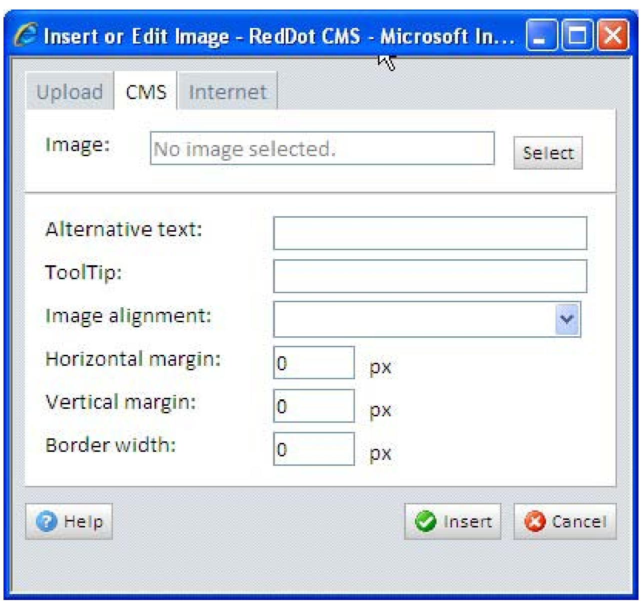
Step 1 – Add Image

1. Be sure your developer has uploaded the image to your site's asset manager.

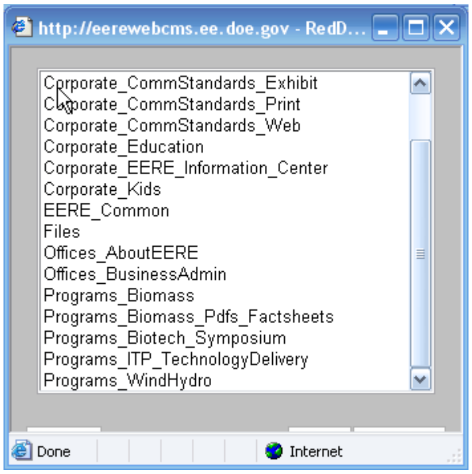
2. In the text editor, place your cursor where you'd like to add your image (learn more about positioning your image below).

3. Select Image  from the toolbar.

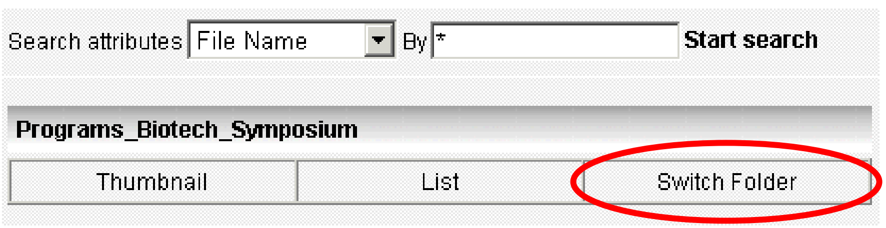
4. From the Insert or Edit Image dialog window, select the CMS tab and select the Select button.



5. Select your site's asset manager (some sites may have multiple asset managers, for different sections of the site):



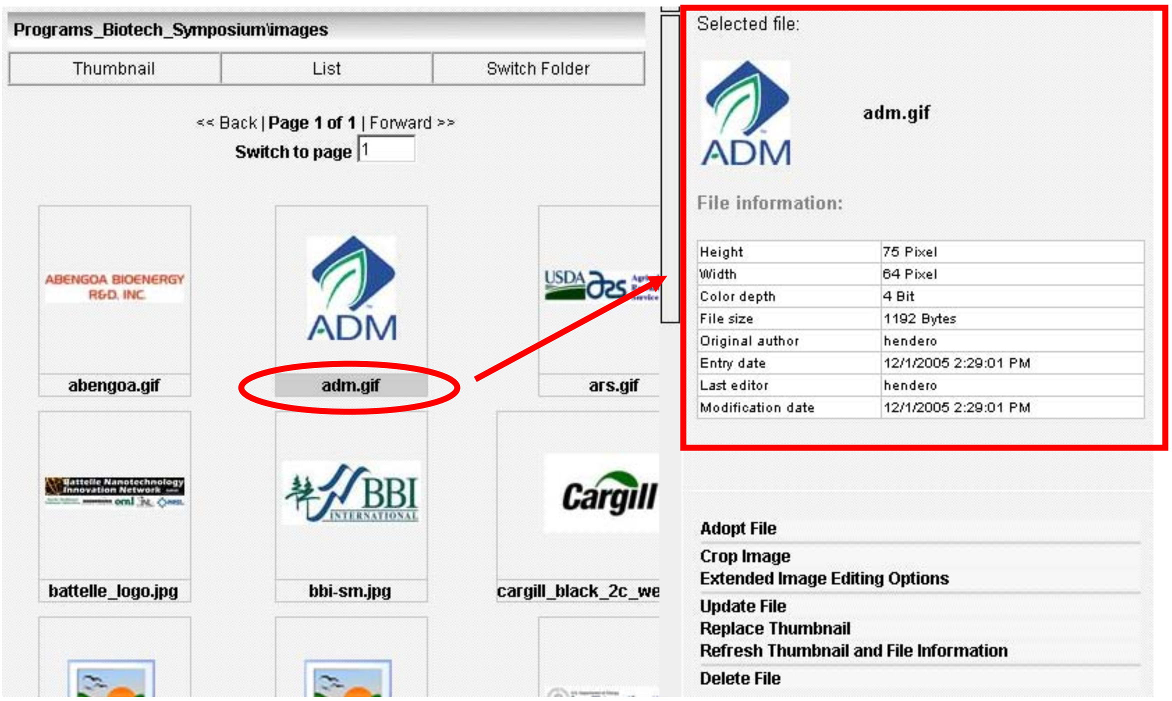
6. You are now in your site's asset manager. Select "Switch Folder":



7. Below the listing for your asset manager, choose the directory (images, etc.) in which your image resides:

8. Choose the image you want to add by selecting the image's name. You can also see a preview of the image by selecting the thumbnail. When you select the file name, information about that image appears on the right side of the screen (if you don't see information, or the thumbnail is incorrect, select "Refresh Thumbnail and File Information" on the lower right to display the file information).

For example:



As your file list grows in size, you can view the contents of the folder as a list (select "List" from the top left), or you can search the contents by file name, original author, last editor or other attributes (search at top of the screen).

9. Select "OK" at the bottom of the asset manager screen.

Note about the "Crop Image" and "Extended Image Editing Options" features: If you decide to crop an image or use the extended image editing options (rotating image, switching to black and white, etc.) features in the asset manager, be sure to save the altered image under a different file name, or it will replace all other instances of that image on the site with the altered image. Instead of altering the image in OpenText, consider having a developer edit the file in a photo editor, and then upload the new file, with a new name, to the asset manager.

Step 2 – Position Image

For general placement, select the image and use your mouse to drag the image into the appropriate location. To fine tune the image position:

1. Select the image.

2. Select Image  from the toolbar.

3. Using the Insert or Edit Image dialog, you can:
   - Tweak the photo alignment (align right or left to wrap text around the image).
   - Add space / margin or a border around the image.

- Add alt text (required by the EERE Web standards). Alt text is the text that appears when you mouse over an image; it is used by screen readers to describe images to visually impaired users, and is required by Section 508. Every image must have alt text (this should simply be a blank space between the attribute quotes in the HTML code for images that do not represent information – like lines, arrows, etc.). Learn more about writing standards-compliant alt text.

Consult your developer if you need to fine-tune image placement or to add a caption.

4. Select "OK" (twice) to exit out of the dialog, then the text editor, and to save your work.

Delete Image

1. Select the image.

2. Select "Delete" on your keyboard.

If you no longer need the image you deleted, ask your EES representative to remove the image from your asset manager.

Update Features

Like other images, graphics created for the feature button are stored in your site's asset manager. The process for adding, changing, or deleting features on sites using the OpenText asset manager is generally the same as the process used by sites where assets are stored directly on the server. However, there are a few exceptions, which are noted below.

Add a New Feature to One Page

Follow the directions in the main feature section under Add a New Feature to One Page; the only change for sites using the asset manager is that you will add the image in a different way:

To add the image: Select the "edit image" red dot ● for the new feature (this will open the text editor) and follow the directions for adding an image from the asset manager to your page (***Note:*** There's no need to position the image, although you will need to add alt text). Be sure your developer has uploaded the new feature graphic to the asset manager before completing this step.

Add the Same Feature to Multiple Pages

Follow the directions in the main feature section under Add the Same Feature to Multiple Pages.

Replace an Existing Feature

Follow the directions in the main feature section under Replace an Existing Feature; the only change for sites using the asset manager is that you will replace the feature image in a different way:

To replace the feature image: Select the "edit image" red dot ● for the feature you want to replace (this will open the text editor). Select and delete the old feature, then follow the directions for adding an image from the asset manager to your page (***Note:*** There's no need to position the image, although you will need to change the alt text). Be sure your developer has uploaded your new feature graphic to the asset manager before you complete this step.

Alter Vertical Position of a Feature

Follow the directions in the main feature section under Alter Vertical Position of a Feature.

Remove a Feature from One Page Only

Follow the directions in the main feature section under Remove a Feature from One Page Only.

Delete a Feature

Follow the directions in the main feature section under Delete a Feature.